

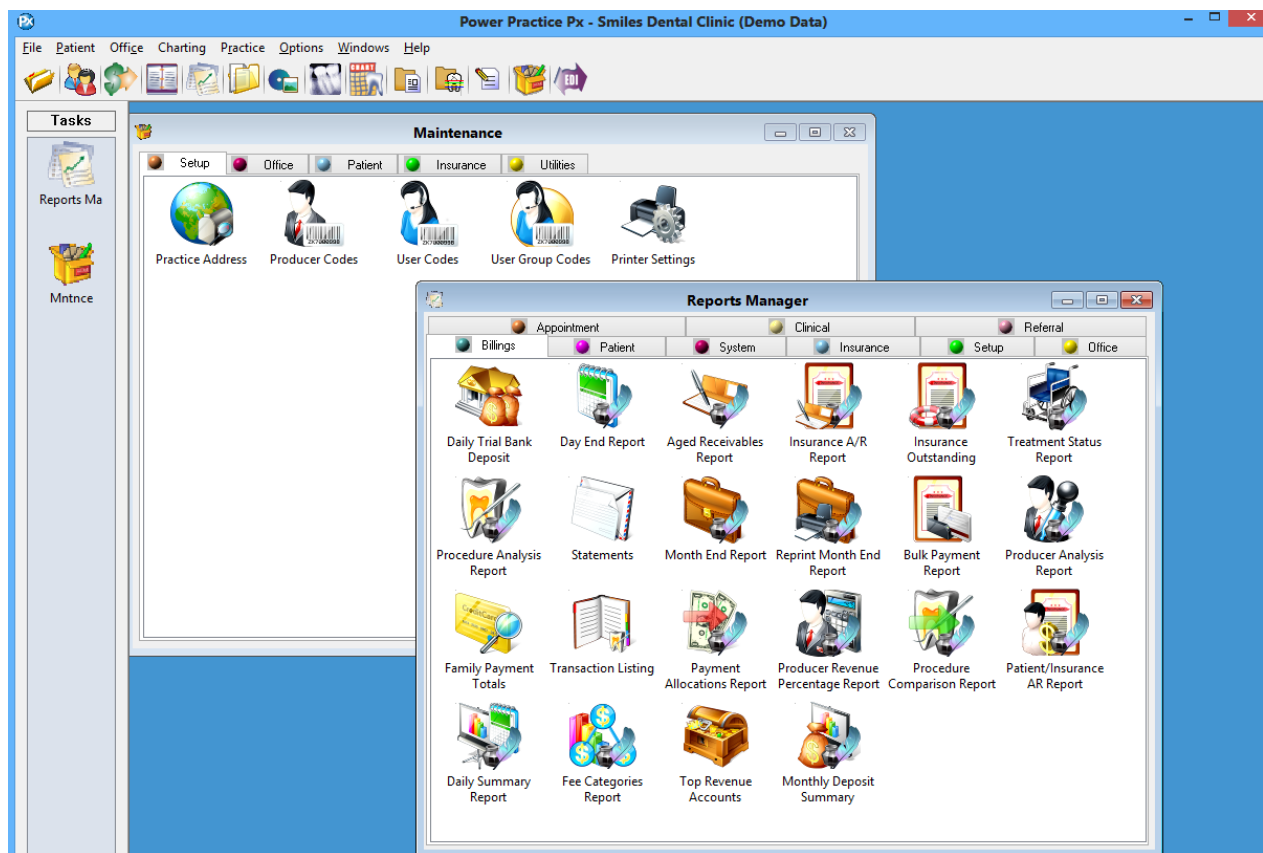
VERSION 4.6 ENHANCEMENTS

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INTRODUCTION

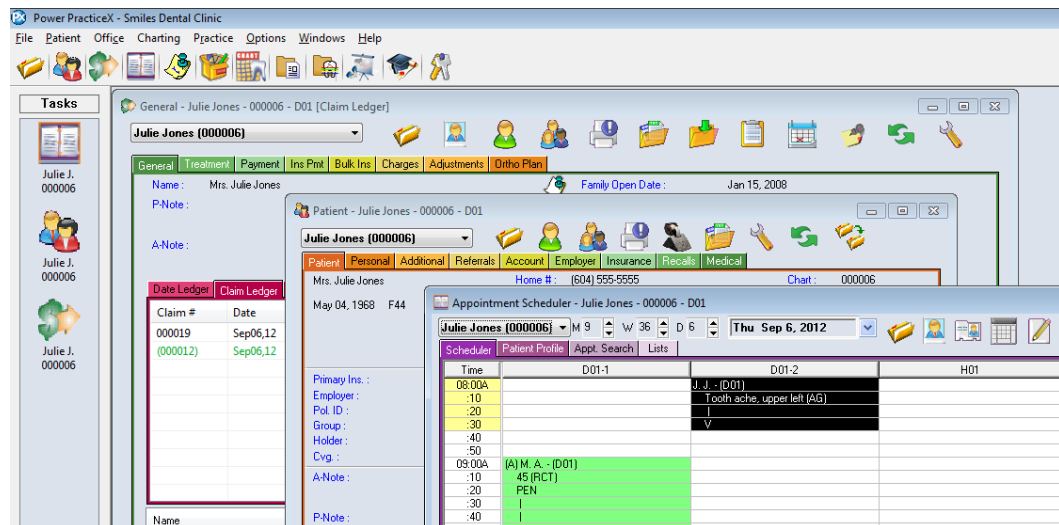
Power Practice Px has a brand new look. This User Manual introduces the new features and enhancements in Power Practice Px Version 4.6. In addition to a description of the general overall changes in each of the areas, you will find a “How To” section for the new features.



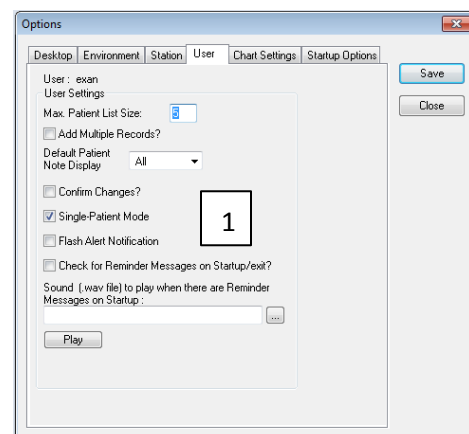
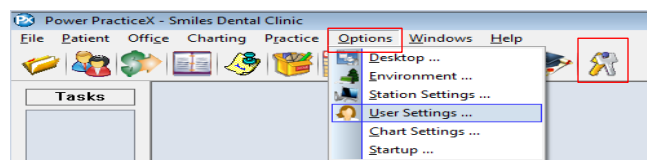
CHANGES IN SETTINGS

There are added features in the Options of Version 4.6.

Each module can change to your current patient, called **Single Patient Mode**. For example: if you change patients in the scheduler, the Patient File, Transactions or other patient specific modules already open in the Tasks bar will automatically change to that patient as well.



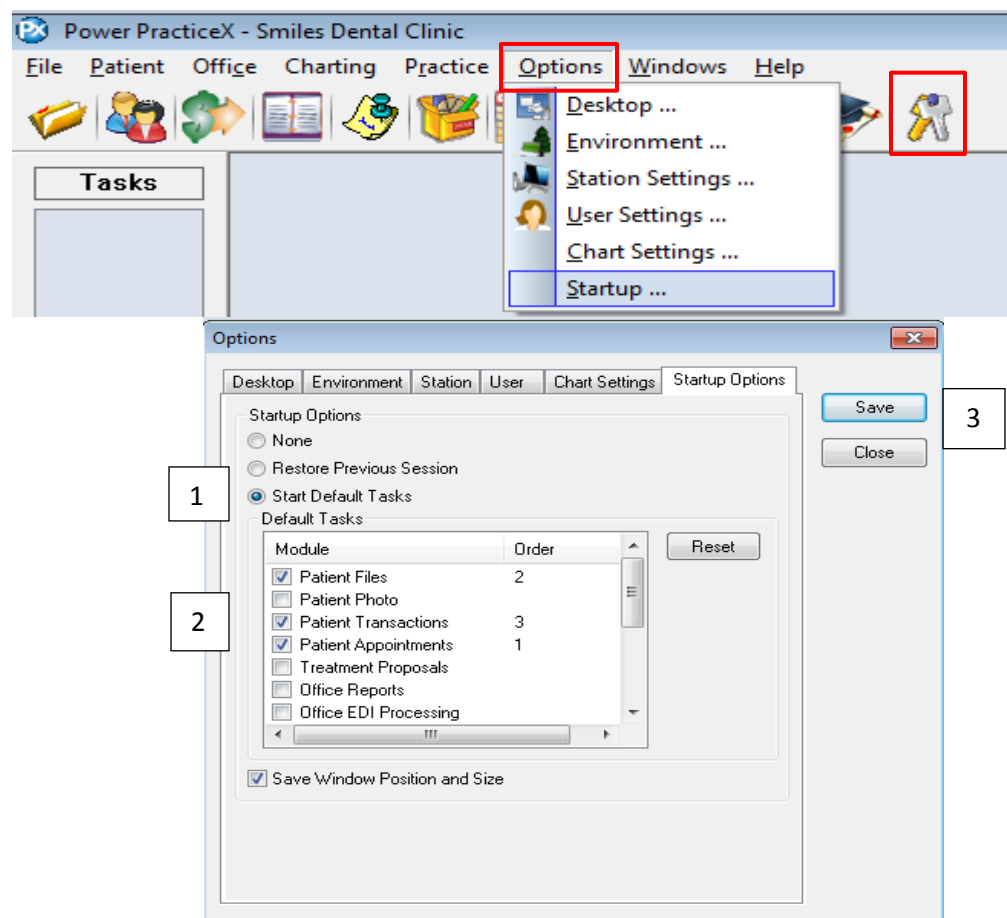
This is set by clicking on **Options** (Menu or Icon) and choosing **User Settings**.



Put a check mark in

1. **Single-Patient Mode**.
2. Click Save.

To have specific modules open up when you start Power Practice Px; go to **Options** and choose **Startup...** or click the keys icon if you have it on your task bar.



1. In the **Startup Options** screen choose **Start Default Tasks**.
2. Under **Module** choose the screens you want to open when you log into Power Practice Px.
3. Click the **Save** button.

Other Startup Options

Restore Previous Session will restore the modules you had open when you last logged out of Power Practice Px.

Save Window Position and Size will reopen modules to the same size they were when you closed out. Choosing both **Restore Previous Session** and **Save Window Position and Size** will restore your last modules in exactly the same spot and size they were when you logged out of Power Practice Px.

Note: In Windows, if one of the windows is maximized upon shut down, then when the program opens all windows will open in the maximized format. Above features apply if windows chosen are specifically sized.

ALERTS

There is a new interactive report listing the alerts attached to patients in Power Practice Px as well as the Charting (if you have it).

1. In Patient File, Click on **Patient Reports**.

2. Select **Patient Alerts** and click OK.

Make the appropriate criteria selections and click **Generate**.

3. Right click on a patient in the list to bring up a menu with other options.

Power Practice Px - BLANK DATABASE - [Patient File]

File Patient Office Charting Practice Options Windows Help

Tasks

Pat File

Home #:

Patient Reports

Reports

- ☐ Patient Listing
- ☐ Patient Labels
- ☐ Patient Information
- ☐ Patient Letter
- ☐ Routing Slip
- ☐ Prescription Pad
- ☐ Recall List
- ☐ Not on Recall List
- ☐ Referrals By Report
- ☐ Referrals By Statistics
- ☐ Referrals To Ref
- ☒ Patient Alerts
- ☐ Patient Insurance Limits

OK Cancel

Patient Alerts Report

Search Criteria

Default Dr: *

Pat Status: *

☐ Patients Only?

☐ Requires Pre-Med?

Alert Codes

Office Codes

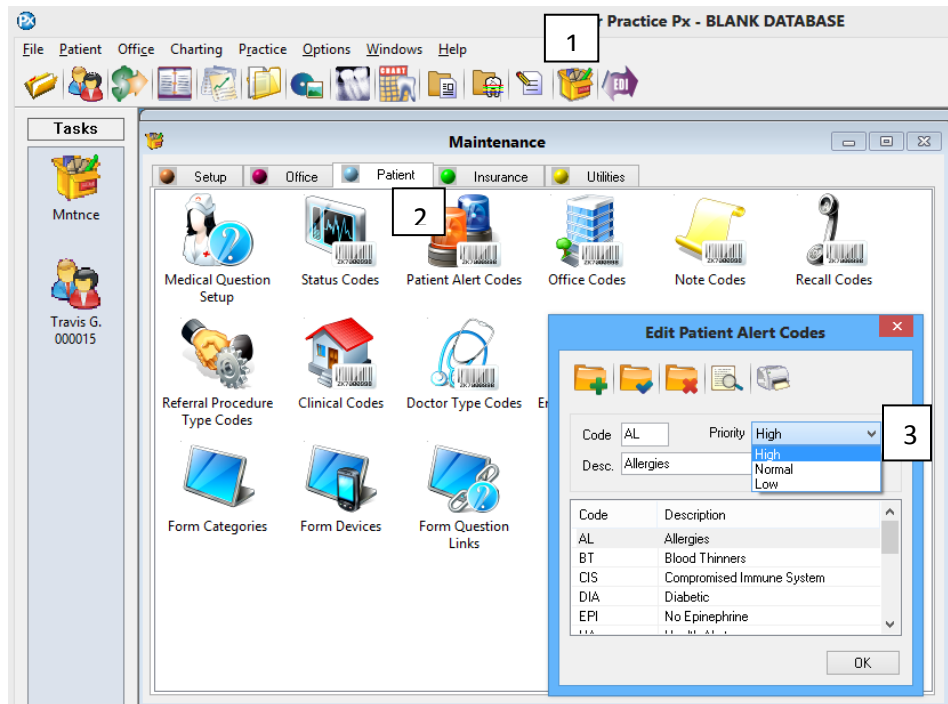
Name	Age	Sts	Pat	Phone #	Email	Code	Description
Abbott, Melanie	F61	A	Y	(0) (604) 555-5555, cell	Y	RX	Prescription
						RXPEN	Penicillin Allergy
Brown, Samantha	*F41	A	Y	(0) (778) 555-5555, mo...	Y	PM	Patient requires pre-medication!
Campbell, Jennifer	PF53	A	Y	(H) (604) 555-5555	N	AL	Allergies
						PRE	Pre-Medication Req'd
Green, Travis	M21	A	Y	(H) (604) 555-5555			
Jones, Brady	M13	A	Y	(H) (604) 555-5555			
Kelly, Lisa	F38	A	Y	(H) (604) 555-5555		LAT	Latex Allergy

Update Alerts...
View Appointment List
Notes...
Print List
Export List to Excel

Select Patient Clear

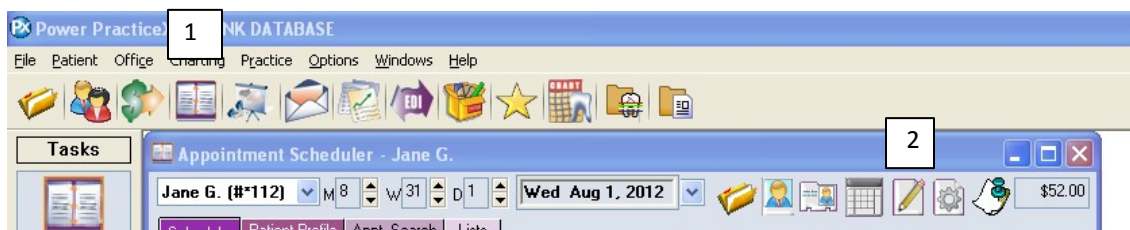
To set a priority for an alert that will allow different levels to be displayed.

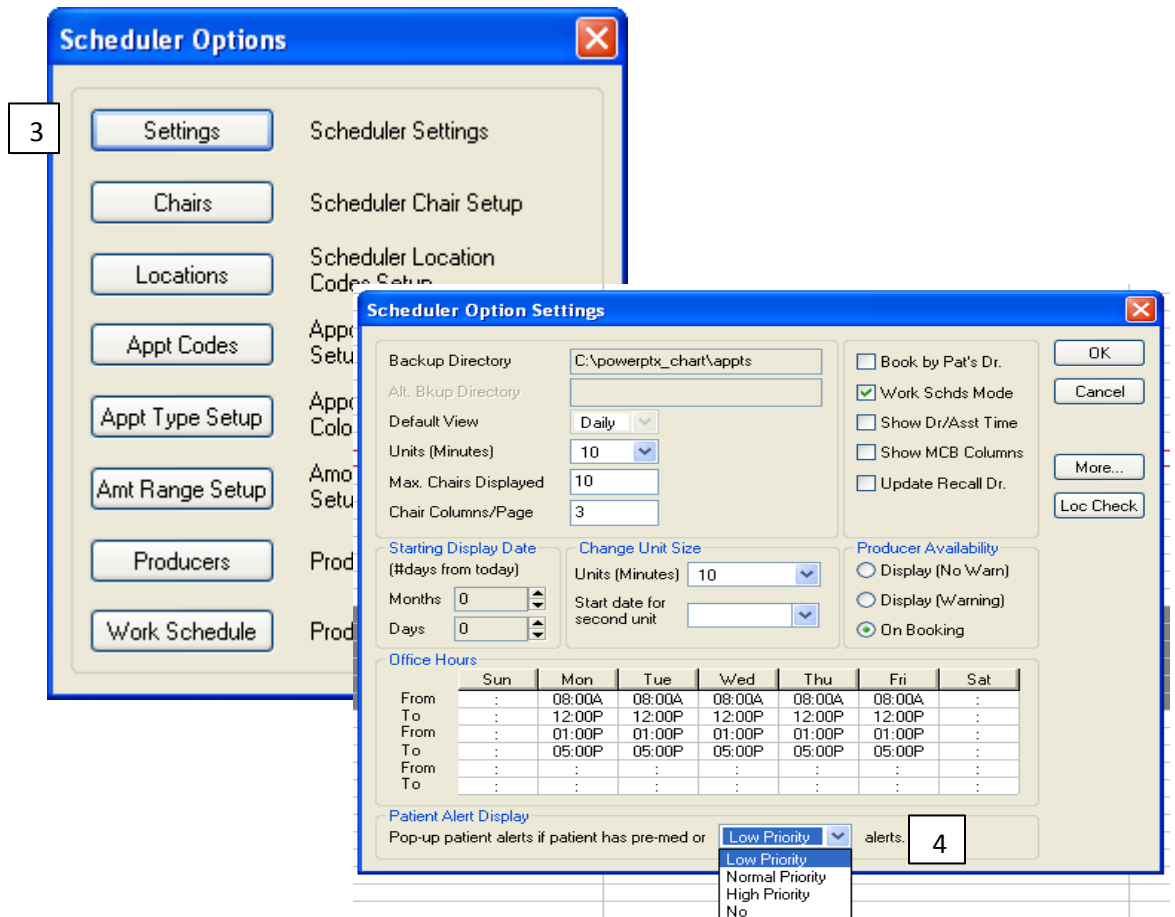
1. Click on **Maintenance Manager** icon, then click on the Patient tab.
2. Double-click on **Patient Alert Codes**.
3. The drop down beside **Priority** can be set for each alert.



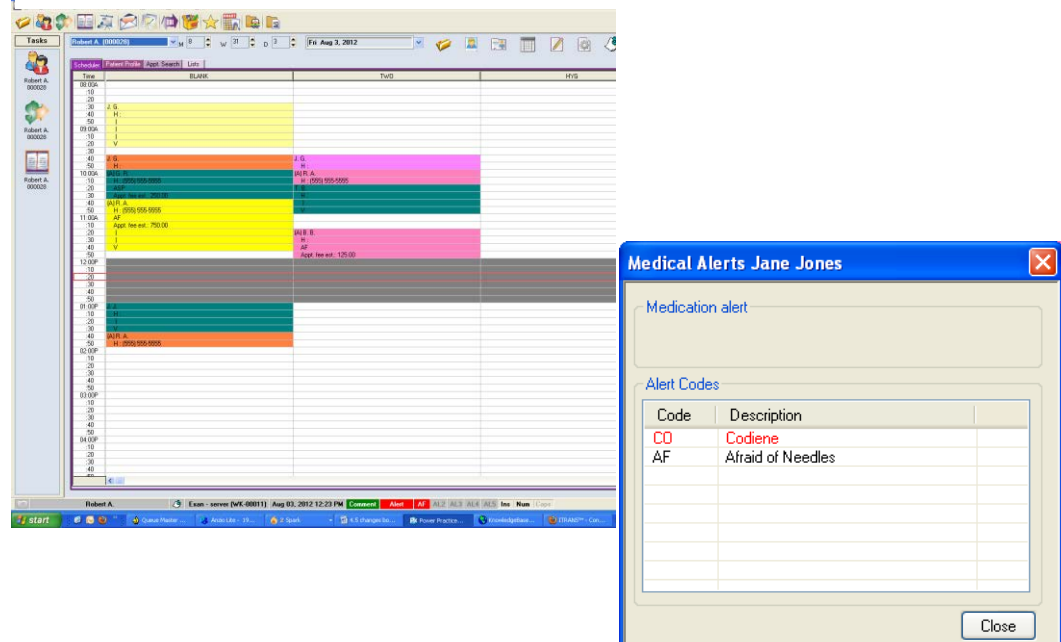
In the **Scheduler** you can choose the priority level for the Medical Alert Pop-up.

1. Click on the **Scheduler** icon.
2. Click on Scheduler Options (the icon with the pencil).
3. Click on the **Settings** button.
4. At the bottom of the screen is the **Patient Alert Display**. Choose the priority level for the pop-ups you want to see. For instance, choosing Low Priority will display any Alerts set to Low Priority and above.





When booking an appointment for a patient, a **Medical Alerts** box will pop up with the Alerts for that patient in different colours. A High Priority will be **red**, Low will be **blue**, and Normal will be **black**.



PATIENT INSURANCE

Two new columns have been added in the **Insurance** tab. Both areas are populated from the information entered in the **Patient Personal** tab.

1. On the policy list, there is a new column to display the policy holder's birth date.
2. In the dependents list there is a new column to indicate the patient status.

Additionally,

3. In **Patient Reports** the **Patient Information** report will now include any insurance comments attached to that patient's policy.

The screenshot shows the 'Insurance - Jennifer Campbell - 000022 - D01' window. The 'Insurance' tab is selected, displaying a table with columns: Policy Hold, Birthdate, Ins, Employer, and Group. A new column for birth date is highlighted with a '1'. The 'Dependents' table has columns: Name, Sts, Cvg, Dep#, and Relation. A new column for patient status is highlighted with a '2'. The 'Patient Reports' dialog is open, showing a list of reports. The 'Patient Information' report is selected, and a new column for insurance comments is highlighted with a '3'.

Policy Hold	Birthdate	Ins	Employer	Group
Jennifer	Apr19,60	PBC	School District #...	0101

Name	Sts	Cvg	Dep#	Relation
Travis	A	Y		Other
Jennifer	A	Y		Self

Policy Holder: Campbell, Jennifer
 Policy Id: 0101
 Group: 0101
 Ins. Co: PBC
 Employer: New Employer
 Comment:
 Policy Coverage: 100/50/50

Item #	Cat	Description	From	To
004	B	Basic-Comp.Exam	01100	01103
001	B	Basic -RC/NP Exam	01200	01203
020	B	Basic-Spex/Emerg	01204	01700

Reports

- ☐ Patient Listing
- ☐ Patient Labels
- ☒ Patient Information
- ☐ Patient Letter
- ☐ Routing Slip
- ☐ Prescription Pad
- ☐ Recall List
- ☐ Not on Recall List
- ☐ Referrals By Report
- ☐ Referrals By Statistics
- ☐ Referrals To Report
- ☐ Patient Alerts
- ☐ Patient Insurance Limits

INSURANCE PAYMENT TAB

There is a new button option in the **Insurance Payment** and **Bulk Insurance** Tabs.

1. **Ins Details** allows you to quickly reference the selected patient's insurance details.

The screenshot shows the 'Ins Pmt - Jane G.' window with the 'Insurance Payment' tab selected. The 'Ins Details' button is highlighted with a red box and the number 1. Below it, the 'Insurance Details - Jane G.' sub-window is open, displaying insurance information for Jane Green.

Insurance Details - Jane G.

Primary		Secondary																												
Insurance	Manulife Financial	Insurance	Autoben																											
Employer	Jane's Designs	Employer	Canada Post																											
Policy Id		Policy Id																												
Group	w123	Group	AAA																											
Holder	Jane Green	Holder	Joe Green																											
Cvg.	100/50/50	Cvg.	80/50/50																											
Comments: insurance comment		Comments:																												
Patient Limit & Deductible Limit: \$1500.00 Ded. \$0.00		Patient Limit & Deductible Limit: \$1187.50 Ded. \$0.00																												
Family Limit & Deductible Limit: Ded. \$0.00		Family Limit & Deductible Limit: Ded. \$25.00																												
Category Limit <table border="1"> <thead> <tr> <th>Limit Type</th> <th>Remaining Limit</th> <th>Reset Date</th> </tr> </thead> <tbody> <tr><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td></tr> </tbody> </table>		Limit Type	Remaining Limit	Reset Date										Category Limit <table border="1"> <thead> <tr> <th>Limit Type</th> <th>Remaining Limit</th> <th>Reset Date</th> </tr> </thead> <tbody> <tr> <td>Category B (12 Months)</td> <td>\$ 1300.00</td> <td></td> </tr> <tr> <td>Basic- Polishing (12 M...</td> <td>\$ 174.80</td> <td>Dec 31, 2012</td> </tr> <tr><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td></tr> </tbody> </table>		Limit Type	Remaining Limit	Reset Date	Category B (12 Months)	\$ 1300.00		Basic- Polishing (12 M...	\$ 174.80	Dec 31, 2012						
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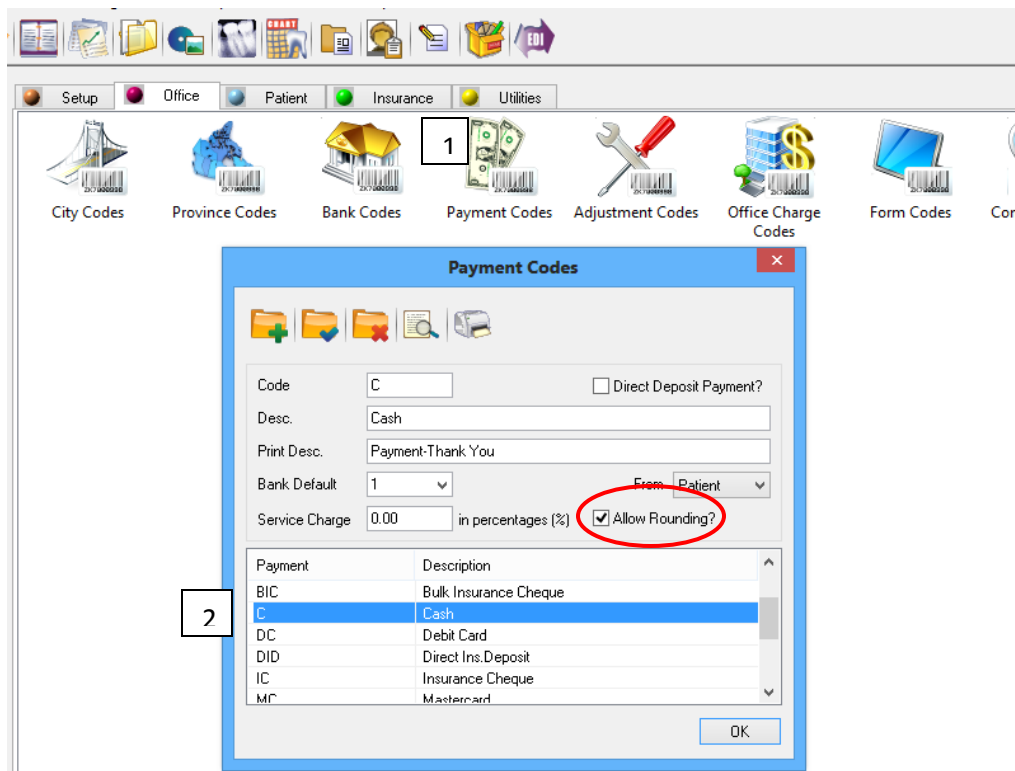
Close

PENNY ROUNDING FOR CASH TRANSACTIONS

Power Practice can be set to handle rounding of cash payments now that the penny has been discontinued.

To activate this feature if you choose to use it, go into

1. **Maintenance** to the **Office** tab and **double click** on **Payment Codes**.
2. Highlight the Cash line and tick the box that says Allow Rounding?. **Click** the Blue Check to save it.

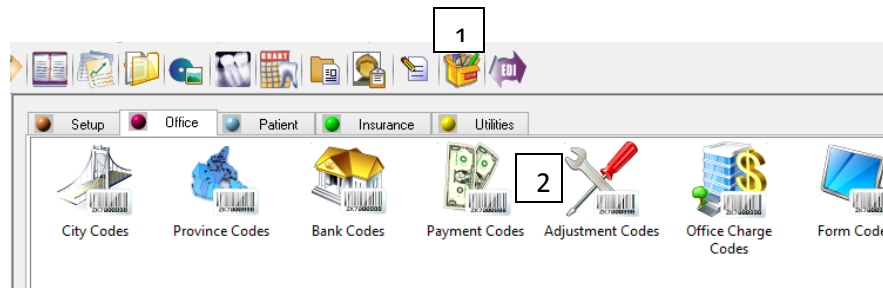


PLEASE NOTE: If you have not already created codes for this that you are using manually, you will need to add 2 adjustments to Power Practice Px to be able to use this feature.

SETTING UP ADJUSTMENT CODES FOR PENNY ROUNDING

If you do not already have adjustment codes that you use for the Penny Rounding,

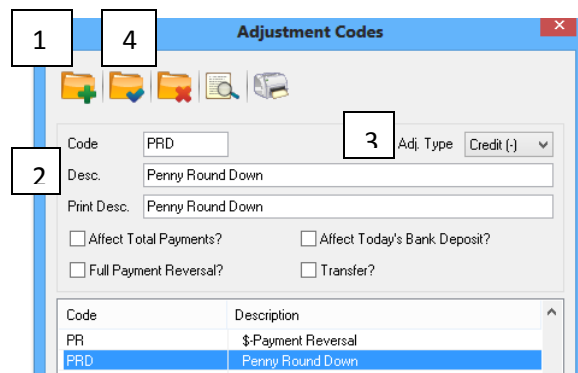
1. Go into **Maintenance**,
2. Go to the **Office** tab and **double-click** on **Adjustment Code**.



You will need to add 2 Adjustment Codes, one for Penny Round Down and one for Penny Round Up. To do this:

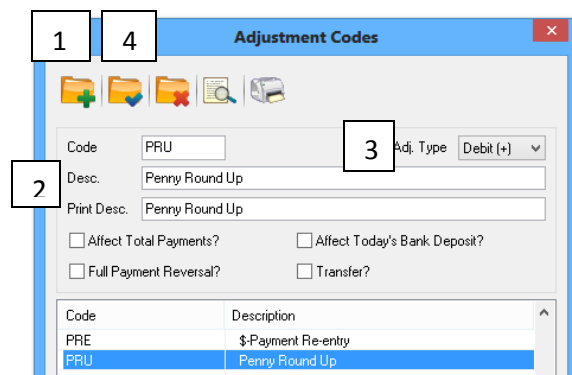
PENNY ROUND DOWN

1. Click on the **Green Plus** to add a new code.
2. Fill in the **Code, Description** and **Print Desc.** We suggest using PRD for Penny Round Down.
3. Set **Adj Type** to Credit(-)
4. Click the **Blue Check** to save.

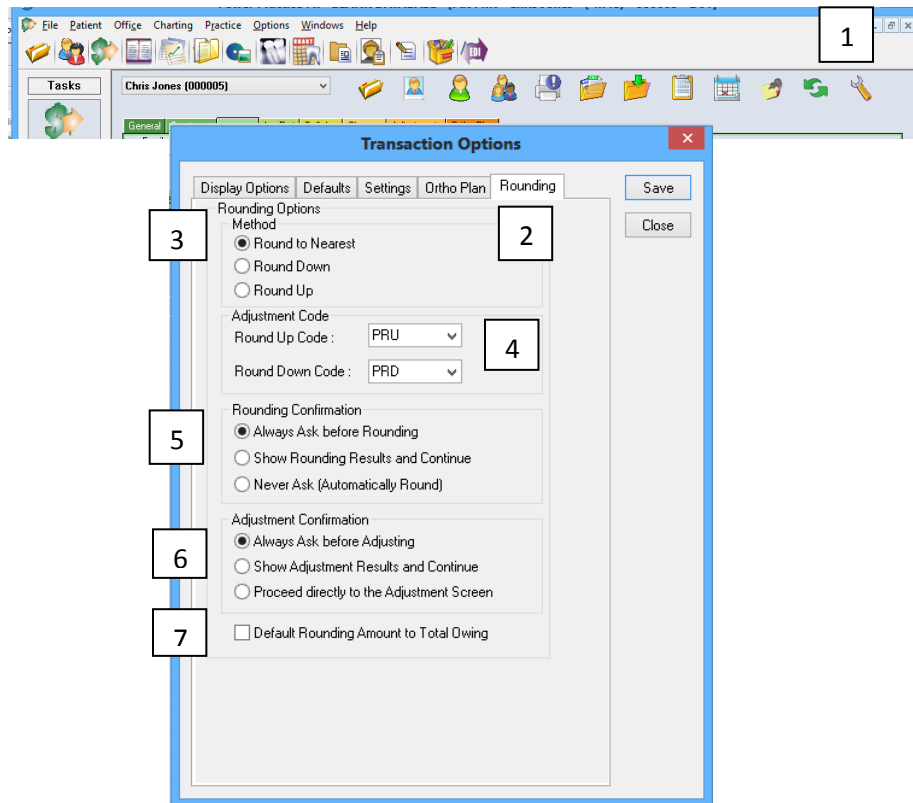


PENNY ROUND UP

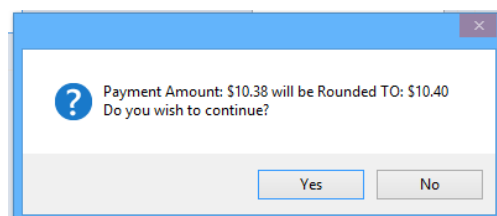
5. Click on the **Green Plus** to add a new code.
6. Fill in the **Code, Description** and **Print Desc.** We suggest using PRU for Penny Round Up.
7. Set **Adj Type** to Debit(+)
8. Click the **Blue Check** to save.



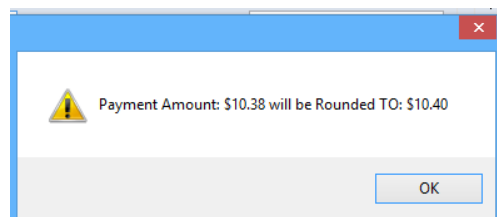
1. Once these have been added to the system, go into **Transactions** to the **Wrench**.
2. Choose the **Rounding** tab.
3. Set your **Method**.
4. Set the **Round Up** and **Round Down** Codes that you've just created in Maintenance or that you are currently using.



5. Choose the **Rounding Confirmation** your office wants. **Always Ask before Rounding** will pop up a confirmation box with each step asking if you want to continue. There is a final confirmation box with this option, showing you your choices and asking you to choose an option to continue.



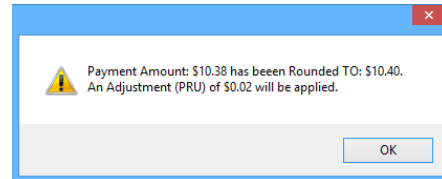
Show Rounding Results and Continue will show you the results with just an OK button.



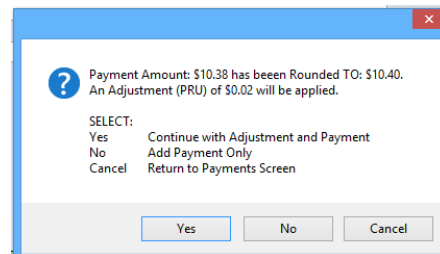
Both of these options will then pop up with an Allocations box to apply the adjustment and a Payment Apply box to apply the payment.

Never Ask(Automatically Round) will put the proper amount into the Amount box on the Patient Payment tab. It will then pop up with the Adjustment Allocations box and the Payment Allocations box.

Always Ask before Adjusting will pop up a box with an OK option.



6. Choose the **Adjustment Confirmation** your office wants. **Show Adjustment Results and Continue** will show a pop up saying how much will be applied as an adjustment.

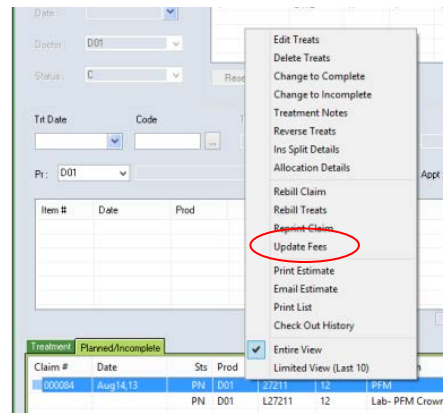


Proceed Directly to Adjustment Screen will take you directly to the Adjustment Allocations with the amount to be applied.

7. **Default Rounding Amount to Total Owing** will go to the Adjustment Allocations box and the adjusted amount will be on the total amount owing on an account.

UPDATE FEES ON PLANNED TREATMENT

On the right-click menu option in Planned Treatments is an **Update Fees** option. You can update the fees on the claim to match the Dr's current fees. Once chosen, you will be prompted to confirm your choice. You can also find this on the right click menu of the **Interactive Treatment Status Report**.



RECEIPT

You now have the ability to email the receipt to the patient providing that patient has an email address on their patient file.

Receipt Printout - George R.

Print receipt for the date period :

From : 08/09/2012 To : 08/09/2012

☒ Print practice name? or Dr. :

☐ Do you wish to include payments only?

☐ Do you wish to include future appointments?

☒ Use new layout?

☒ Email Receipt? ☐ Preview?

☐ Save to Drafts folder?

Copies : 1

Buttons: OK, Cancel, Set As Default, Email Body

Comment1 :

Comment2 :

Be sure to choose the option **Use new layout?** to access the **Email Receipt?**.

APPOINTMENT BOOK

You will now be able to view up to 30 chairs in the Appointment User View.

To view a list of digitally stored Appointment Daysheets:

1. Click on **Print Today's Appointments**, choose **Digital Copy**.
2. Click **View**.
You can highlight the day you want to view and
3. Click **Details**.

[illegible]

To book multiple **Planned** appointments without having to reopen the Appointment Detail window:

1. From the **Scheduler** screen, go to **Patient Profile**.
2. Click the **New** button.
3. Add in your appointment information and click the **Next** button. It will bring you right back to a blank Appointment Detail screen and you can add in your next appointment information.

The screenshot displays the 'Appointment Scheduler - BLANK B.' application window. The 'Patient Profile' tab is active, showing patient information for 'BLANK BLANK M32'. The 'Appointment Detail - BLANK B.' window is open in the foreground, showing fields for appointment date, time, chair, status, and procedure. The 'Next' button is highlighted with a red box and the number 3. The 'New...' button in the background window is highlighted with a red box and the number 2. The 'OK' button in the foreground window is highlighted with a red box and the number 1.

Appointment Scheduler - BLANK B.

BLANK B. [1] M 8 W 32 D 7 Tue Aug 7, 2012 \$0.00

Patient Profile

Patient Information
Patient Name: BLANK BLANK M32
Address:
City/Prov:
Other Contact:
Home #:
Work #:
Other #:
Contact: H
Email:
Chart: 000001
Status: Active Patient
Dr #: 03
Hyg #: H01

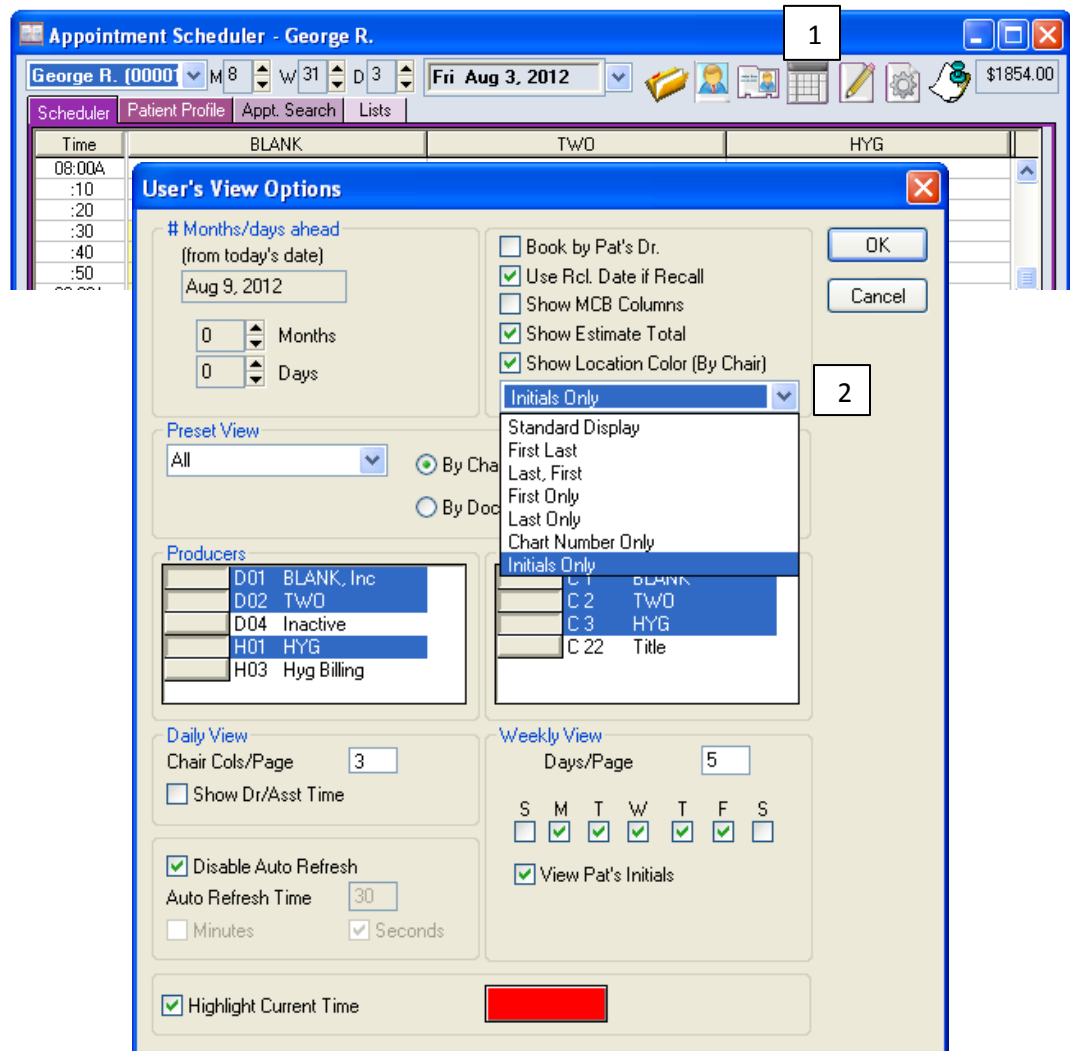
Appointment Detail - BLANK B.

Apt. Date: 08/07/2012 Chair: C01 Status: P
Time: 12:00 AM Prod: H03 ☐ Confirmed
Appt. Code: Units: Total:
Type: 0 0 0 0 0 0
Procedure: Est. 0.00 Priority:
Notes: ☐ S/Notice

Buttons: OK, Cancel, Next, New..., Edit..., Delete, Default, View By (Patient, Family), Exclude Past Booked Appointments

To choose different options for the display of patient names both on the **Scheduler** and on the **Daysheet**:

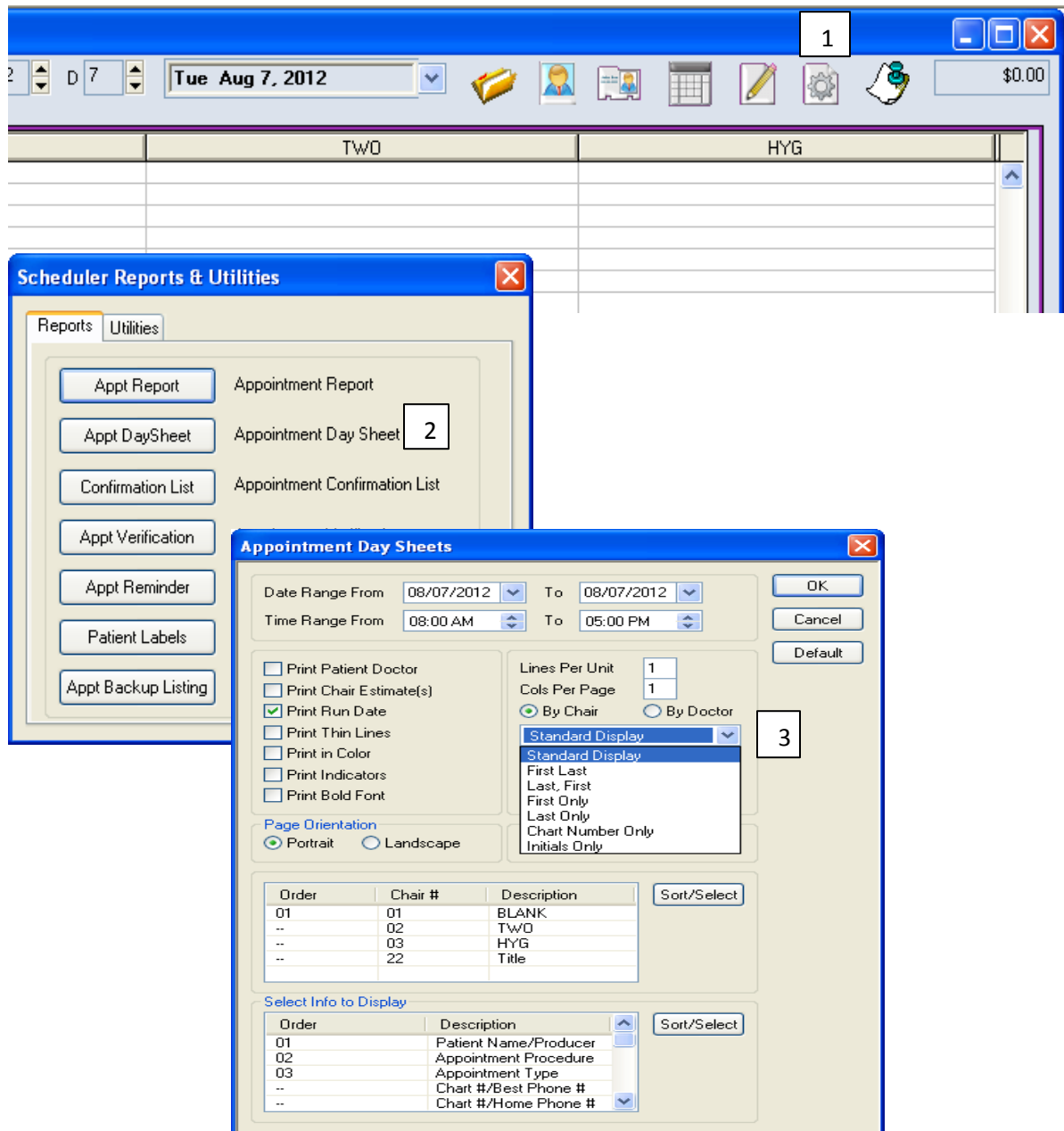
1. To set the way a patient's name displays on the scheduler go into **User View Options**.
2. Press the drop down arrow and select the display option you want.



To choose the way you want the patient names to print out on the Daysheet :

Go to **Appt DaySheet** either by right-clicking on a blank spot on the scheduler to bring up a menu and choosing **Appt Daysheet Printout** or

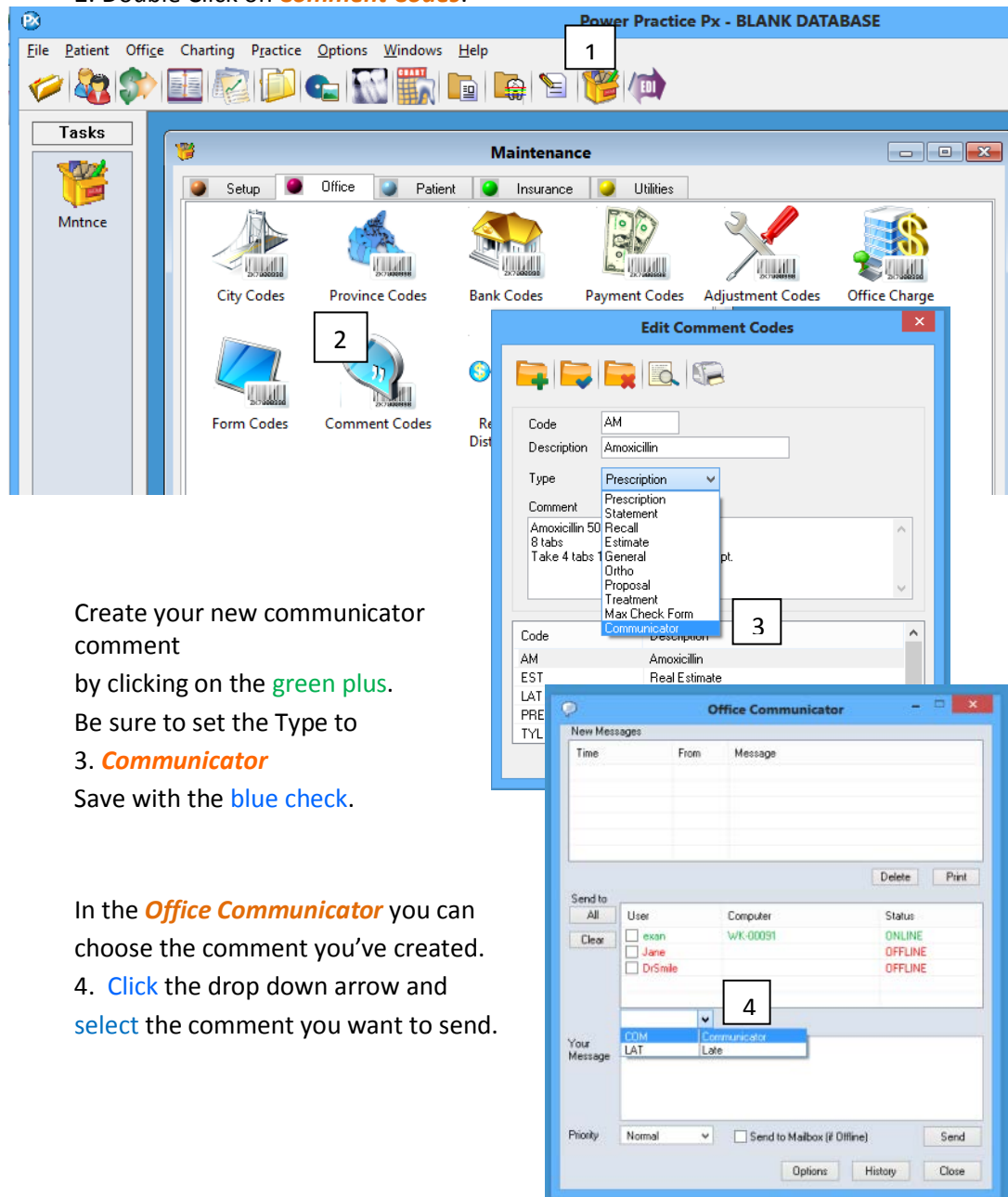
1. Click on **Scheduler Reports & Utilities**.
2. Choose **Appt DaySheet**.
3. Press the drop down arrow and select the display option on the printout that you want.



OFFICE COMMUNICATOR

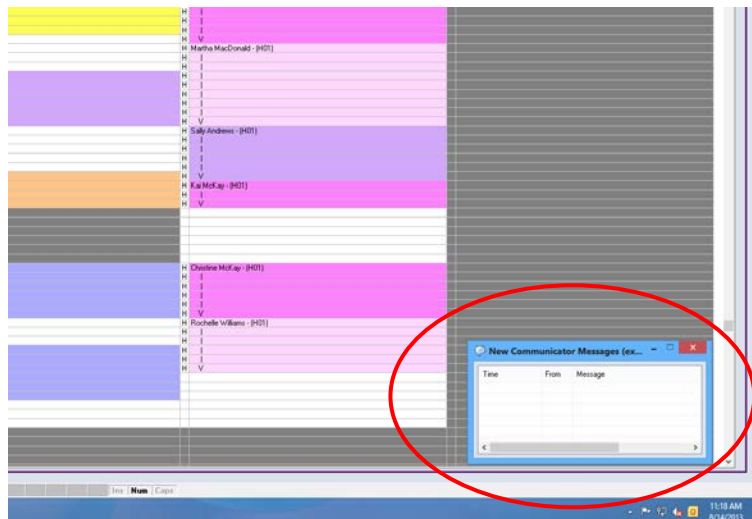
Pre-set messages can now be created for the Office Communicator.

1. In **Maintenance** go to the **Office** tab.
2. Double Click on **Comment Codes**.



The Office Communicator can now also open as a pop-up window that can be resized and moved around your screen.

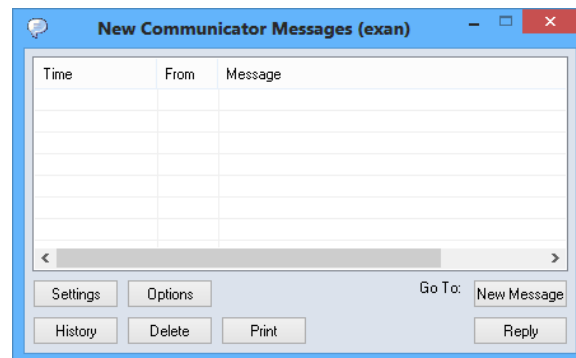
To set this up go to **Office** then **Office Communicator** and click on the **Options** button. Put a tick in **Use Popup Window For ALL message types?**



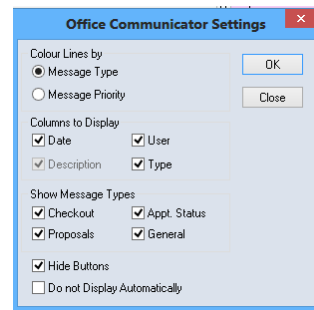
There is a right click menu in the new Communicator window that will take you to those specific settings.

Go To: New Message take you to a New Message screen.

Options... will take you to the basic Communicator Options Screen.

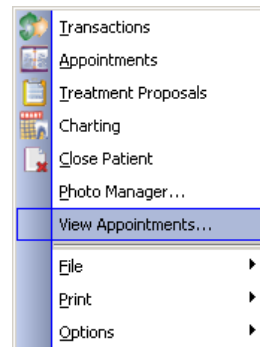


Settings... is where you choose what message types you want to see, what columns you want to see and if you want to Show or Hide Buttons. Hide Buttons will take them off the bottom of the Communicator screen when it is in Pop-up mode.

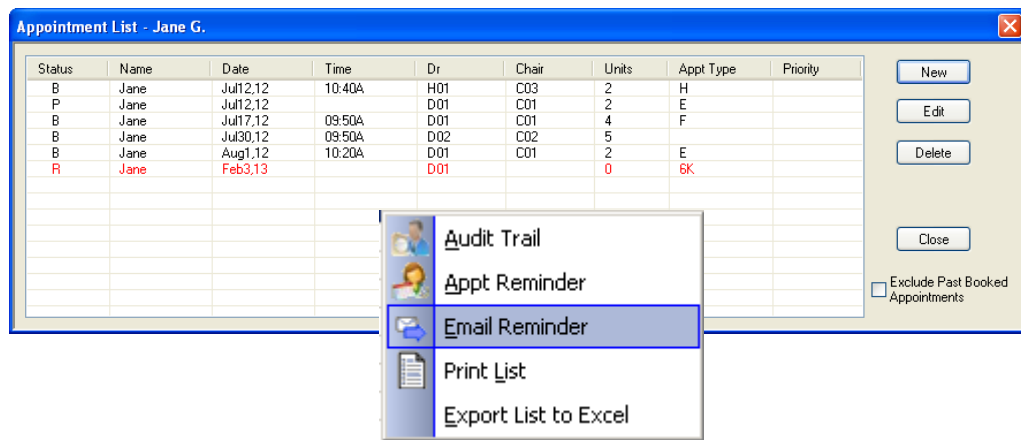


ADDITIONAL FEATURES

In the majority of the **Patient File**, **Transactions** and **Charting** tabs you will now have the ability to **right click** and select **View Appointments**.



This will open the following appointment list for the selected patient where you will have the ability to print list, add, edit, modify appointments and print or email appointment reminders.



Right click on an appointment in the list to access a menu that will allow you to email your patient a reminder of their upcoming appointment.

There is a new **Held Payment** default option accessible through **Transactions**.

1. Go to **Options/Settings**.

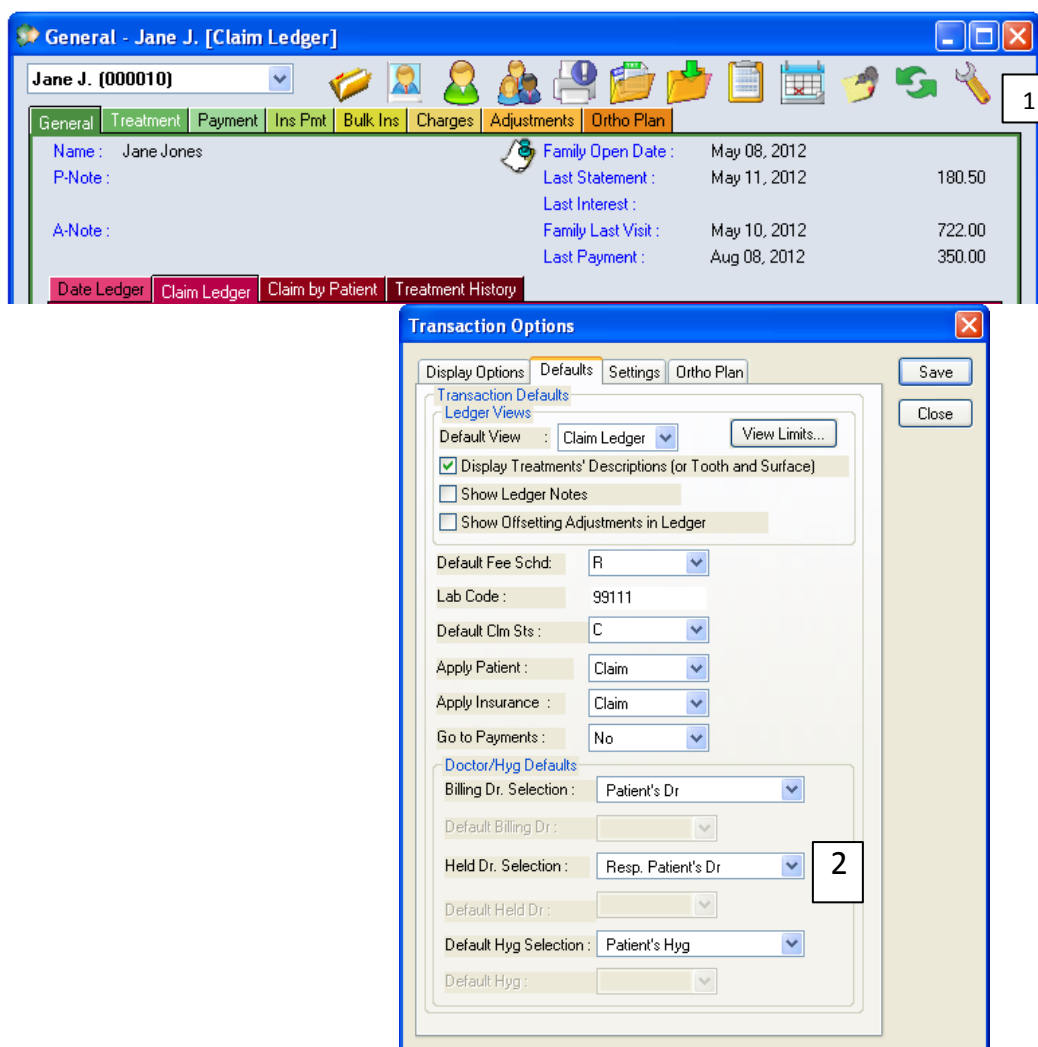
2. Choose the **Defaults Tab** and you now have the ability to choose a default Held Doctor.

You have 3 options:

a. *Resp. Patient's Doctor* – Will automatically place held payments under the selected patients default Dr. (Patient Files/Personal Tab).

b. *Default Dr.* – Gives you the ability to select one doctor to have all payments default to when going into held.

c. *No Default* – blank entry, will bring up the current box so you can select who it should be held for.

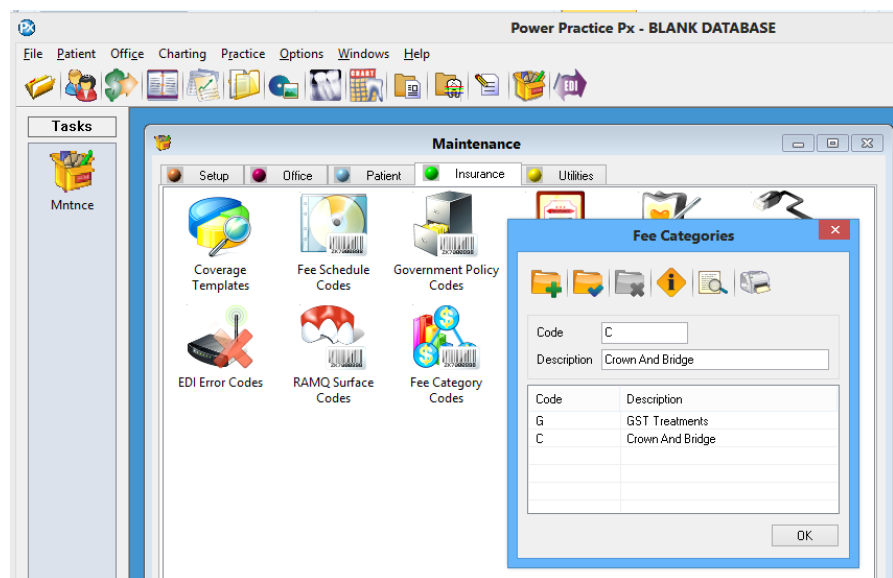


FEE CATEGORY REPORT

In **Reports Manager** there is a new **Fee Categories Report** that allows you to run a report on specific procedure codes or office codes by attaching certain categories to the codes.

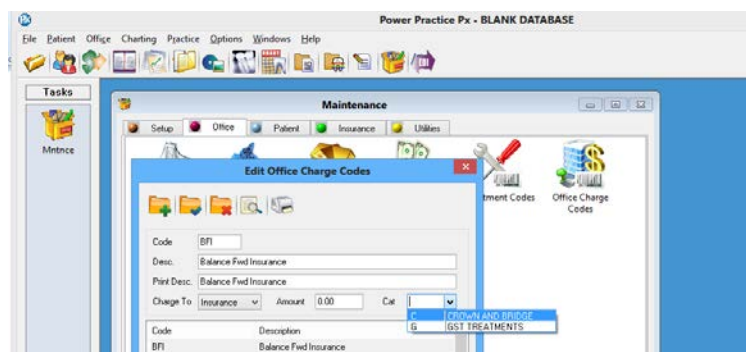
Before you attempt to run this report, you will need to set up the Fee Category Codes and then attach these codes to the specific procedure(s).

1. In **Maintenance**, go to the **Insurance** Tab.
2. Double Click on **Fee Category Codes**.
3. Create the code by clicking on the green plus.



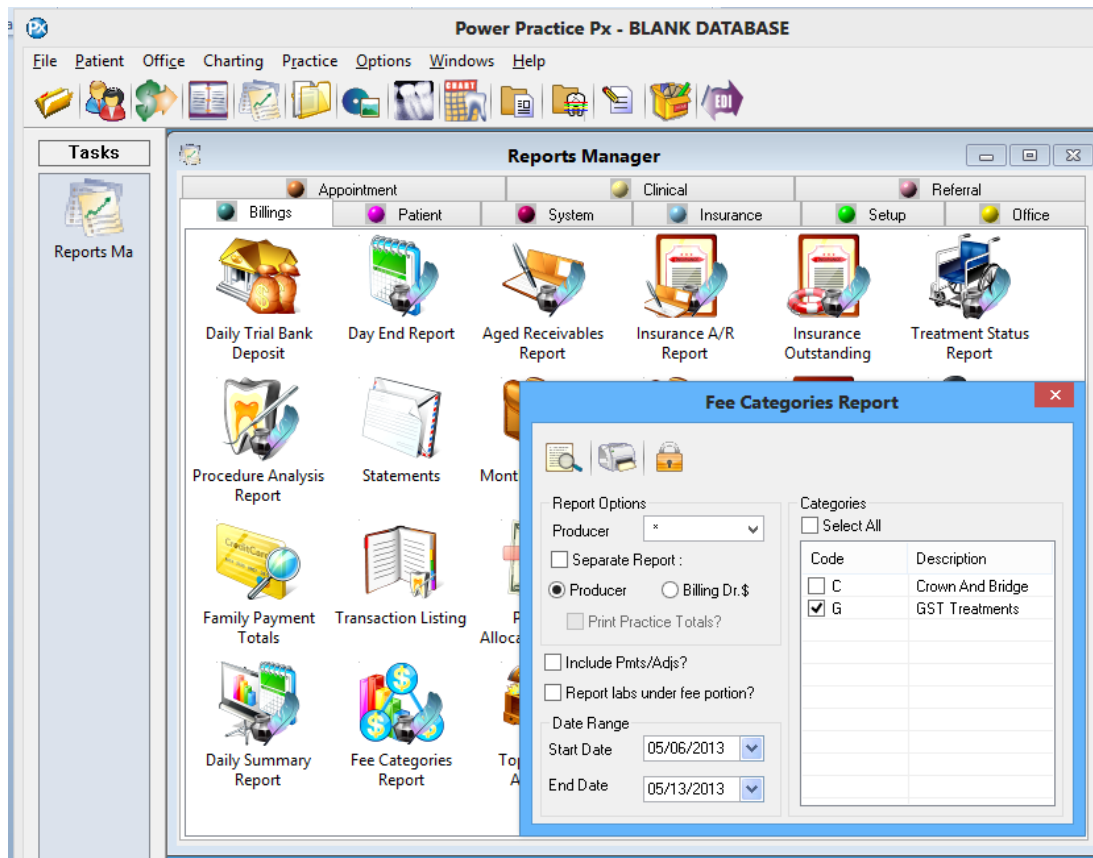
Categories can be linked to either selected Procedure Codes or Office Charge Codes.

1. In **Maintenance**, go to either the **Insurance** Tab for Procedure Codes or the **Office** Tab for Office Charge Codes. Search for the code and select it.
2. In the Edit Procedure Code/Office Code dialogue window, **select the code**.
3. Select the **Fee Category Code** from the drop down and save with the **blue check**.



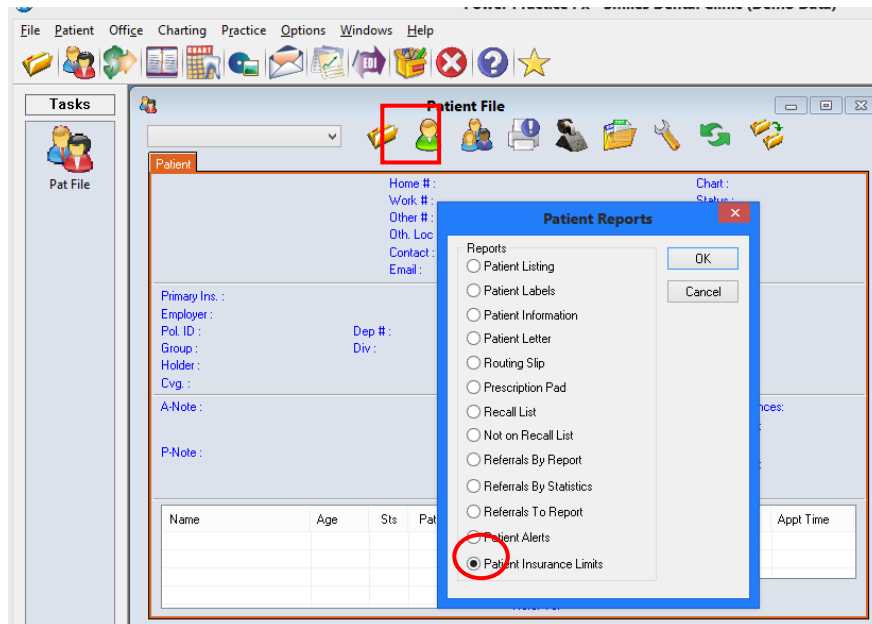
To create the Fee Category Report

Go to the **Report Manager** and select the **Fee Categories Report**. Select your report criteria and either preview or print the report.



PATIENT LIMITS INSURANCE REPORT

In the **Patient File** under **Patient Reports** is a Patient Insurance Limits report. This interactive report will show insurance information on the patient such as their limit reset dates and their remaining balances.



To generate this report, choose your options. You can choose a specific Dr, Patient Status, Insurance Company, Group number and Reset date range. Once you've made your choices, [click](#) the Generate button.

Patient Insurance Limits Report

Search Criteria

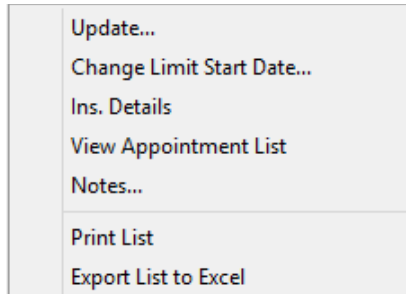
Default Dr: * ☐ Patients Only? Ins: ...

Pat Status: * ☐ Covered? Group:

Reset Dates

Start: End:

Name	Sts	Pat	Cvg	Relation	Ins	Employer	Group	Limit Type	Remaining Limit	Reset Date
Andrews, Sally	A	Y	Y	Self	GWL	Tim Horton's	125515	Patient Limit (12 Months)	\$ 875.50	Dec 31, 2013
Brown, Samantha	A	Y	Y	Self	MANU	Starbucks Coffee	2525	Patient Limit (12 Months)	\$ 2425.00	Dec 31, 2013
Brown, Samantha	A	Y	Y	Spouse	GWL	ABC Automotive	49537	Category B (12 Months)	\$ 1432.50	Dec 31, 2014
								Category M (12 Months)	\$ 724.80	Dec 31, 2014
Brown, Tyler	A	Y	Y	Spouse	MANU	Starbucks Coffee	2525	Patient Limit (12 Months)	\$ 3000.00	Dec 01, 2013
Brown, Tyler	A	Y	Y	Self	GWL	ABC Automotive	49537	Category B (12 Months)	\$ 1240.50	Dec 31, 2013
								Category M (12 Months)	\$ 1000.00	Dec 31, 2013
Campbell, Jennifer	A	Y	Y	Self	PBC	School District #42	0101	Patient Limit (12 Months)	\$ 1500.00	Apr 02, 2014
Davies, Jeanette	A	Y	Y	Self	CAL	Rona	6254	Category B (12 Months)	\$ 1000.00	May 01, 2014
								Category M (12 Months)	\$ 500.00	May 01, 2014
Green, Travis	A	Y	Y	Other	PBC	School District #42	0101	Patient Limit (12 Months)	\$ 1351.21	Apr 02, 2014
Kelly, Lisa	A	Y	Y	Other	GWL	Lexus Canada	1248	Patient Limit (12 Months)	\$ 952.32	May 30, 2014
Kelly, Mike	A	Y	Y	Self	GWL	Lexus Canada	1248	Patient Limit (12 Months)	\$ 1500.00	May 30, 2014
Williams, Gary	A	Y	Y	Self	GWL	GE Canada Inc	1258	Patient Limit (12 Months)	\$ 3000.00	Apr 30, 2014
Williams, Rochelle	A	Y	Y	Other	GWL	GE Canada Inc	1258	Patient Limit (12 Months)	\$ 3000.00	Apr 30, 2014



Right Click on a patient in the list to access a menu.

Update... This will pull up the selected patient's Dependent Limits box.

Change Limit Start Date... You can highlight a group of people or just one person and change the Limit Start Date.

Ins. Details - This will bring up the selected patient's Insurance Details.

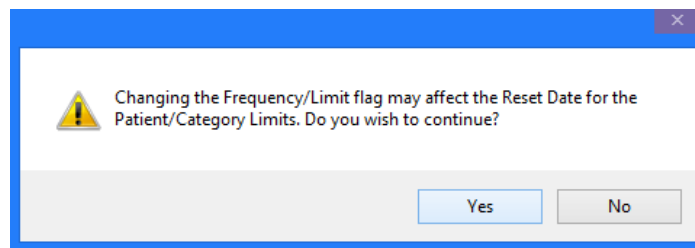
View Appointment List – This will bring up the selected patient's Appointment List.

Notes... This will bring up the selected patient's New Note box.

Print List – This will send the list to your printer

Export List to Excel – This will export the list to Excel if you have Excel linked to Power Practice Px.

You will now get a warning if you tick or untick the Frequency/Limit based on Calendar Year.



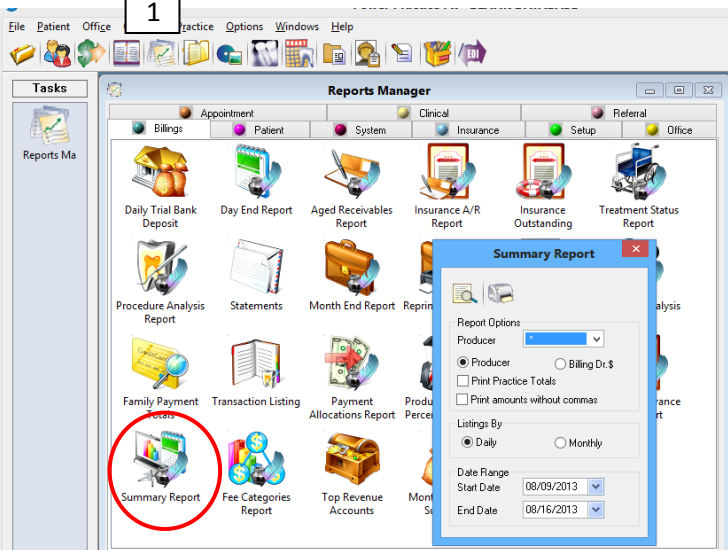
ENHANCED SUMMARY REPORT

1. Go to **Reports Manager**.

Double click on Summary Report.

The Summary Report has been adjusted from the Daily Summary Report.

You can still get a daily Summary for the producers, but now you can get monthly or yearly totals as well. You choose the date range.



Summary Report

Report Options

Producer ☒ Producer ☐ Billing Dr.\$

☐ Print Practice Totals

☐ Print amounts without commas

Listings By

☒ Daily ☐ Monthly

Date Range

Start Date 08/09/2013

End Date 08/16/2013

Page 1

5, 2013

Date	Fees/Chgs	Labs	Fee Adj	Net Fees	Payments	Pmt Adj.	Net Pmts	A/R Column
February 2013	218.60			218.60				0.00
March 2013	2,201.60	414.00	126.00-	2,489.60	50.00-		50.00-	2,658.20
April 2013	1,708.60	0.00		1,708.60	1,252.10-	129.60	1,122.50-	3,244.30
May 2013	1,814.90	388.20		2,203.10	30.00-		30.00-	5,417.40
June 2013	672.52	0.00		672.52	420.00-		420.00-	5,509.92
July 2013	371.20	0.00		371.20				5,941.12
August 2013	3,439.40	457.20	0.02	3,896.62	1,497.77-	31.92	1,465.85-	8,371.89
Totals:	10,326.82	1,259.40	125.98-	11,460.24	3,249.87-	161.52	3,088.35-	

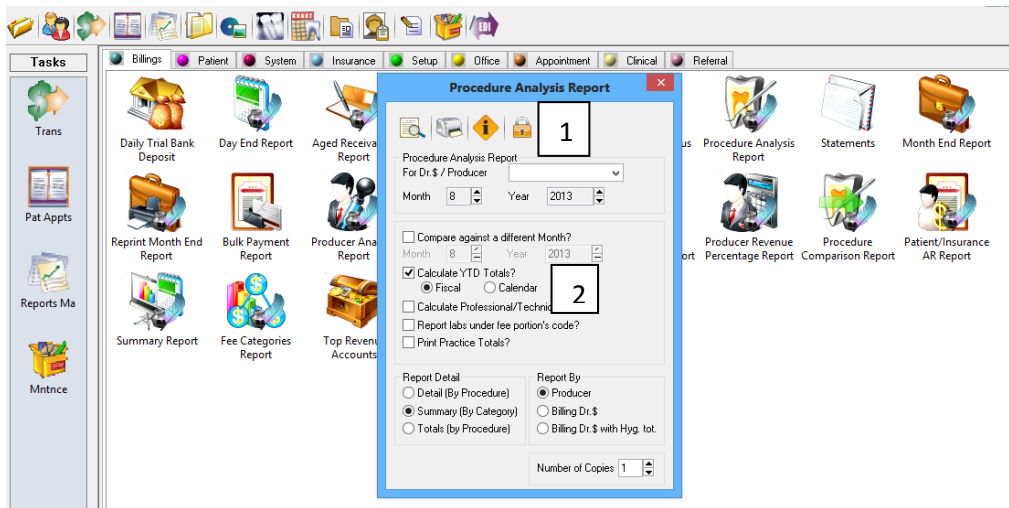
* Fees/Chgs = Dental Fees + Tx D is counts + Office Charges
 Fee Adj = Net Fee Adjustments
 Pmt Adj = Payment Transfers + Net Pmt Adjustments

Fee Adj	Fee Adjustment Description	Adj Amount	Pmt Adj	Payment Adjustment Description	Adj Amount
FD	Fee Discount	126.00-	PR	\$-Payment Reversal	101.52
PRU	Penny Round Up	0.02	PCM	\$-Pmt Credit (decr) Memo	0.00
		0.00	RP	\$-Refund Payment	10.00
			TSF	Inter-Providers Transfers	50.00
Total Fee Adjustments :		125.98-	Total Payment Adjustments :		161.52

PROCEDURE ANALYSIS REPORT

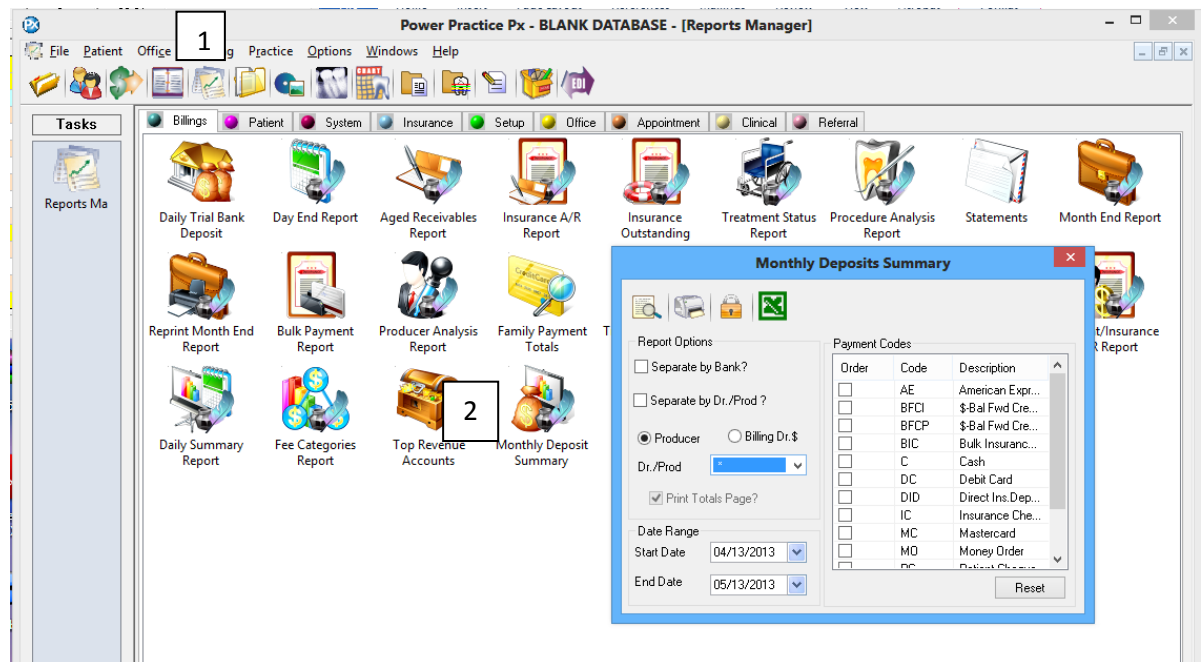
Two new features on the Procedure Analysis Report are the

1. default button. You can set your choices to default for the next time you use the report
2. and the option to choose to run the report's YTD(year to date) totals by fiscal or calendar year.



MONTHLY DEPOSIT SUMMARY REPORT

1. Go to **Reports Manager**.
2. **Double click** on Monthly Deposit Summary.
Select what you want to view and either preview, print or export to Excel. You can choose your order for Payment Codes or choose to only view specific codes.





TOP REVENUE ACCOUNTS

In **Reports Manager**, under **Billings** is a **Top Revenue Accounts** Report.

You can choose to run it for all doctors or specify an Account Holder's Dr.
You can List Top percent of accounts.

Do you want to include Insurance Payments?
Include Payment Adjustments?
List All Family Members?

You can choose the date range you want the report to look at.

Top Revenue Accounts

Report Options

Acct Holder's Dr. *

List Top 20 %

☒ Include Insurance Pmts?

☒ Include Pmt Adjustments?

☒ List Family Members?

Date Range

Start Date 08/31/2011

End Date 08/31/2012

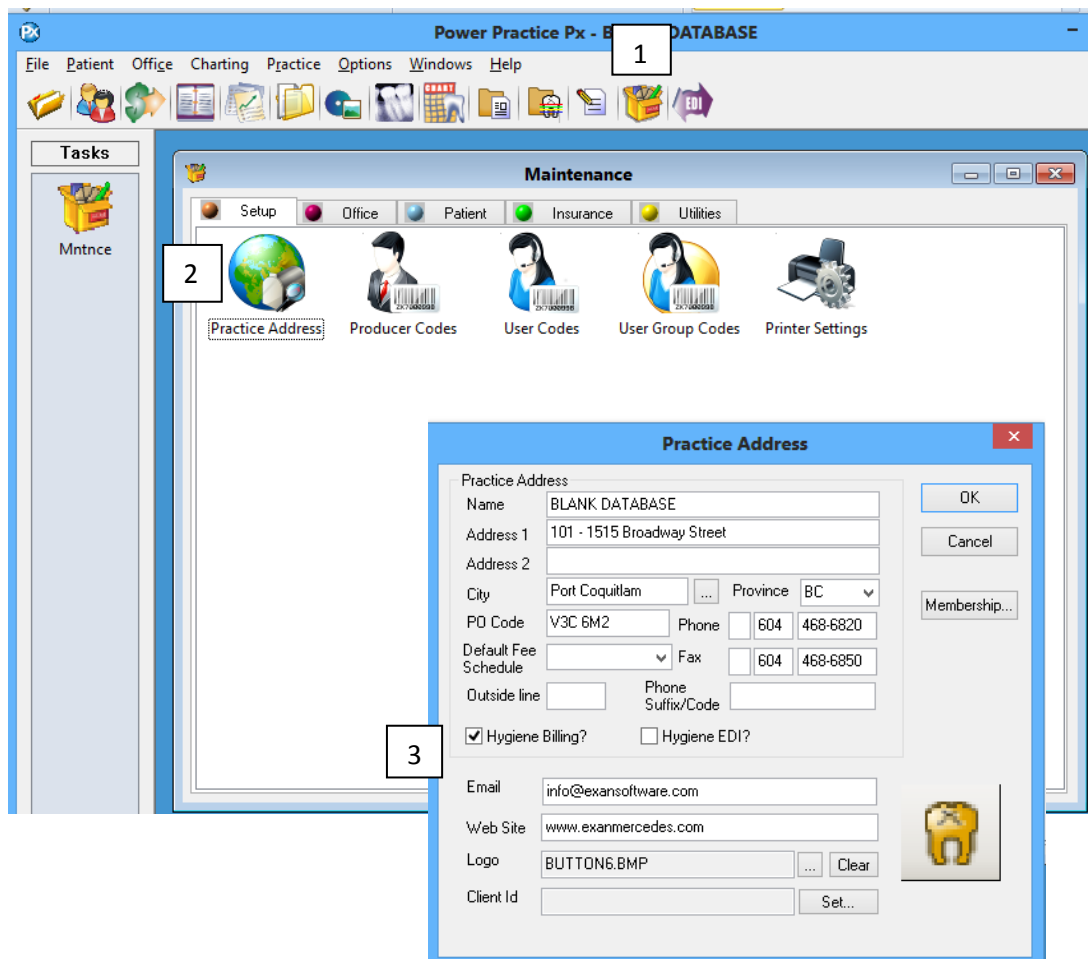
Date: Sep 27, 2013 11:16:12		Top Revenue Accounts		
		Date Range : Sep 27, 2012 - Sep 27, 2013 (F or All Doctors)		
#	Account Holder	Best Contact#	Email	
1	Campbell, Jennifer (PF53) Address: Family Members:	(H) (604) 555-5555 Oak Street, Vancouver V2RT6J Green, Travis (*M22)	email@address	
2	Williams, Gary (*M69) Address: Family Members:	(W) (555) 555-5555, 19 daytime Lougheed Highway, Coquitlam J4SD8F Williams, Rochelle (F65)	email@address	1,460.30 1
Displaying 2 of 6 Accounts (Top 20%)			3,675.30	9

HYGIENE BILLING

Power Practice Px now has the ability to use a hygienist for billing claims. When available, a hygienist will also be able to bill claims electronically

IMPORTANT NOTE: YOU CANNOT HAVE THE SAME ID FOR A BILLING DOCTOR AND BILLING HYGIENIST. FOR EXAMPLE, YOU CANNOT HAVE A D01 AND H01 BUT YOU CAN HAVE A D01 AND H02.

1. Go to **Maintenance**.
2. From the Setup tab, choose **Practice Address**.
3. Choose **Hygiene Billing** (leave Hygiene EDI unchecked until it becomes available) and click **OK**.



1. Choose **Producer Codes**.
2. Either add a new hygienist or highlight one already entered.
3. Choose **the Fee Schedule** you want the hygienist to use when charging treatment.
4. Add in the hygienist's **billing number** and click the **blue check** to save the record.

Maintenance

Setup Office Patient Insurance Utilities

Practice Address **1** Producer Codes User Codes User Group Codes Printer Settings

Producer

Prod. Type: Hygienist ID: 02

Last Name: Hygiene First Name: Billing Middle Name: Title:

Address: City: Prov.: Postal: Business Phone: Home Phone:

3 Fee Schedule: R CDA License#: 0101 ☒ Use MCB

Specialist #: EDI #: Color1: Color2:

Spec. Title: RAMQ#/MSI#: Billing Prod #: 02

☐ Inactive

Producer	Last Name	FirstName	CDA License #	Active
D01	Smiles	John	1234	Y
H01	Thompson	Sara		Y
H02	Hygiene	Billing	0101	Y

2

OK

This hygienist will now show in all the drop downs in billing doctor fields. When printing a claim form for a billing hygienist it will show a CDHA screen and print a CDHA claim form.

OTHER ENHANCEMENTS

Custom Reports

The patient’s email address will now display on a custom report.

May/28/13	Responsible Patients							Page	1
<u>Patient Name</u>	<u>Sex/Age</u>	<u>Sts.</u>	<u>Dr.</u>	<u>Chart No.</u>	<u>Alerts</u>	<u>Fam. A/R</u>	<u>Home Ph.</u>	<u>WorkPhone</u>	<u>Cont.</u>
Mrs. Jennifer Campbell	F53	A	01	000022		\$ 1,226.50	(604)555-5555		H
	E-mail: support@exansoftware.com								
	Comment: very nervous patient								
Mrs. Julie Jones	F45	A	01	000006		\$ 442.10	(604)555-5555		O
	E-mail: info@exansoftware.com								

Printing labels is more uniform. The extra space has been removed.

Mrs. Jennifer Campbell 102 1135 Oak Street Vancouver, BC V2R T6J	Mrs. Julie Jones 11548 Willow Avenue Toronto, ON T5R D3G
--	--

You can now search on blank criteria when using the “Is” or “Is Not” Condition.

New Report Maker

1. Report Title: Blank Criteria

2. Report Type:
☐ Family
☒ Patient
☐ Referrals
☐ Ins. Companies
☐ Ins. Policies
☐ Recalls
☐ Appointments
☐ Claims/Treatments
☐ Office Charge
☐ Payments
☐ Adjustments

3. Sort By:
Order Description
1 Pat. Last Name
2 Pat. First Name
Pat. Preferred N...
Pat. Chart Number

4. File Type: Patient

5. Criteria: Pat. Preferred Name
Pat. Chart Number
Pat. Sex
Pat. Birthdate
Pat. Birth Month

6. Condition: ☒ Is (=)
☐ Is Not (not =)
☐ Is One Of (a or b)
☐ Between (from/to)

7. Value(s):

Available:
Report
Merge Letters
Labels

Make the selection(s) of what to search on for the report
Select the File, the Criteria, the Condition, and the Value(s)

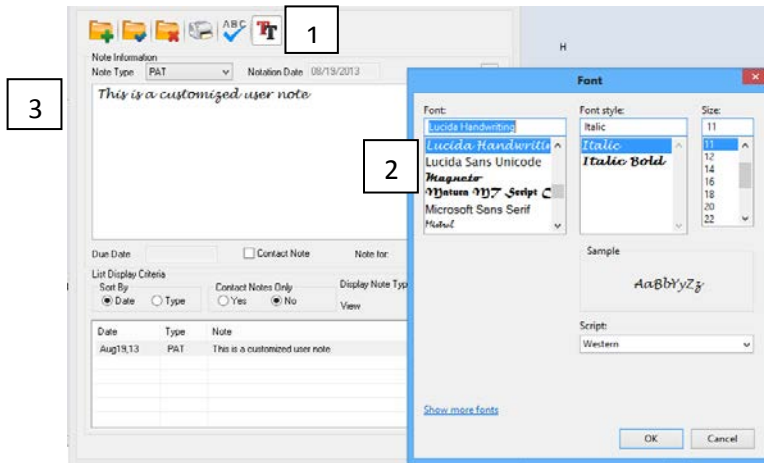
8. Selections Made:
File Type Criteria Condition Value
Patient Pat. Birthdate Is

Buttons: Close, Run..., Reset, Edit Mode, New, Save, Delete

NOTES

The fonts in the Notes areas of Power Practice and Power Chart can be customized for each user. Go into a patient's Note.

1. Click on the Font button.
2. Choose your font, font style and size.
3. When a note is highlighted or edited, you will see it with the font choices you've made.



CHART

INTRODUCTION

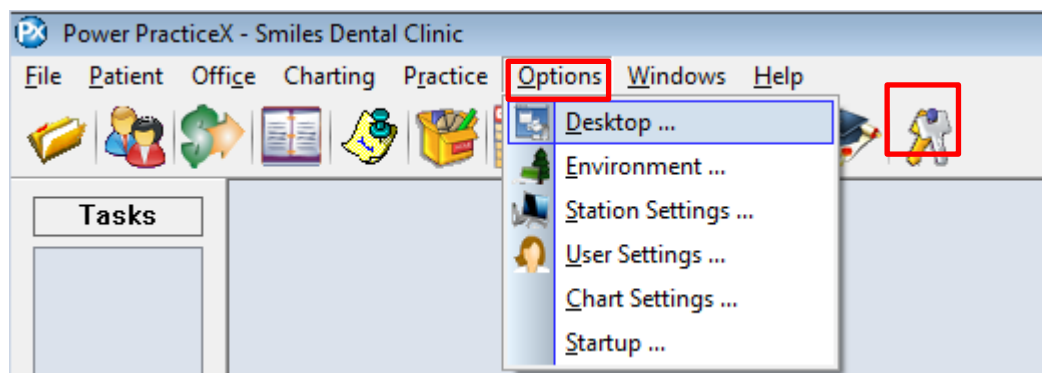
All Chart Modules are now part of Power Practice Px. This enhancement means various features are now merged to make the Charting aspect of Power Practice Px flow more smoothly.

The Version 4.6 desktop combines the Charting and Practice Management Icons onto one **Tool Bar**. For example you can move from the Scheduler to Perio to the Odontogram to Patient File by clicking on any of the selected icons.

Once Version 4.6 is loaded on each computer, each **Login** will require some set up. This is especially important in the operatories as the ability to move through the charting tasks now incorporates the **Tool Bar**.

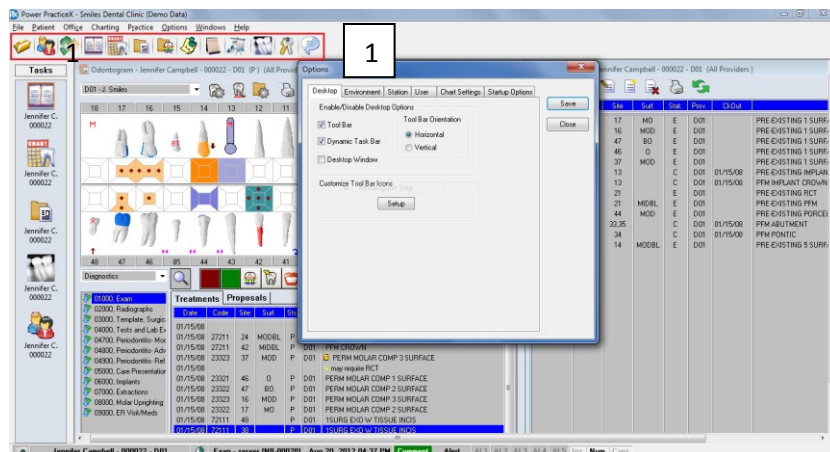
USER SPECIFIC SET UP: *Desktop, User, Start Up*

To customize your **Desktop**, click on **Options** and select **Desktop**.

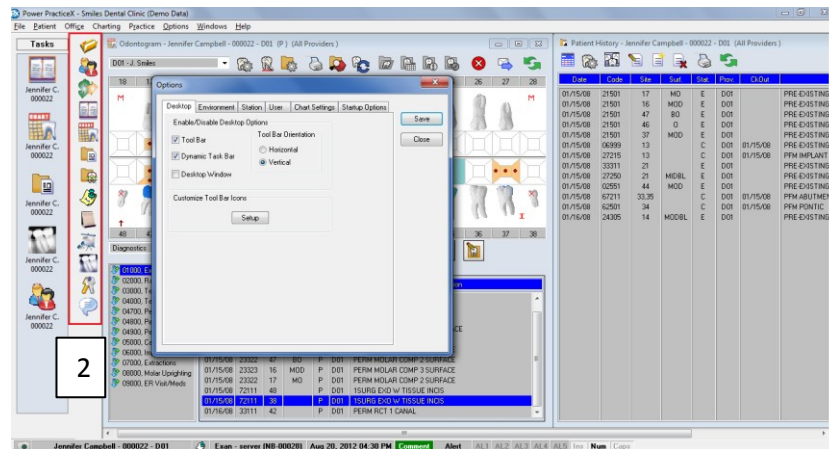


The Tool Bar orientation has a selection of either a **Horizontal** or **Vertical** orientation.

1. Horizontal orientation



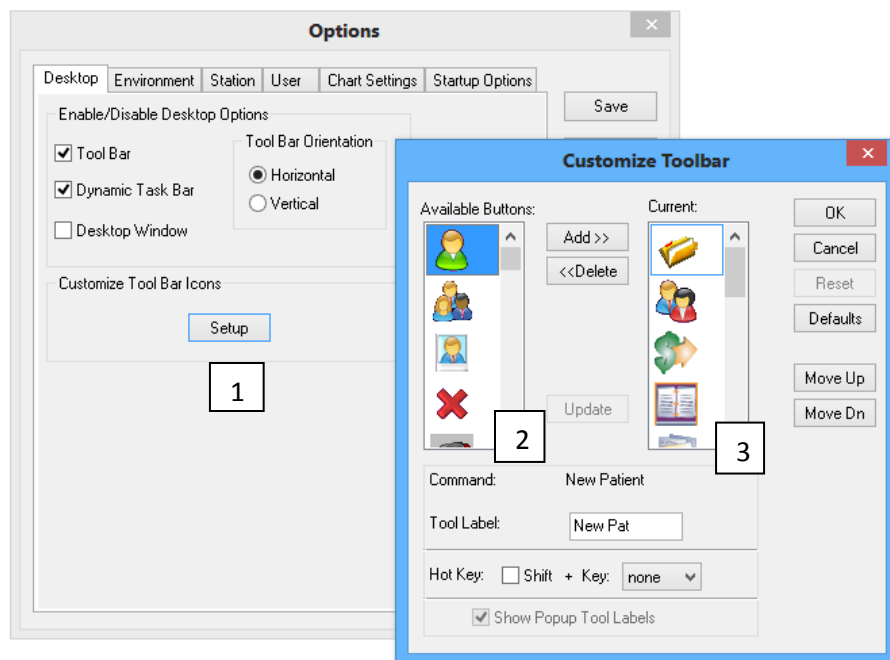
2. Vertical orientation



Each user has the ability to create a unique toolbar with their preferred icons for Charting and Power Practice Px.

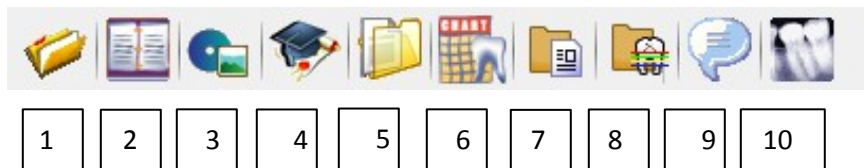
To customize the toolbar:

1. Click on the Setup button.
2. Select from **Available Buttons**.
3. Choose **Add** to add it into **Current**.



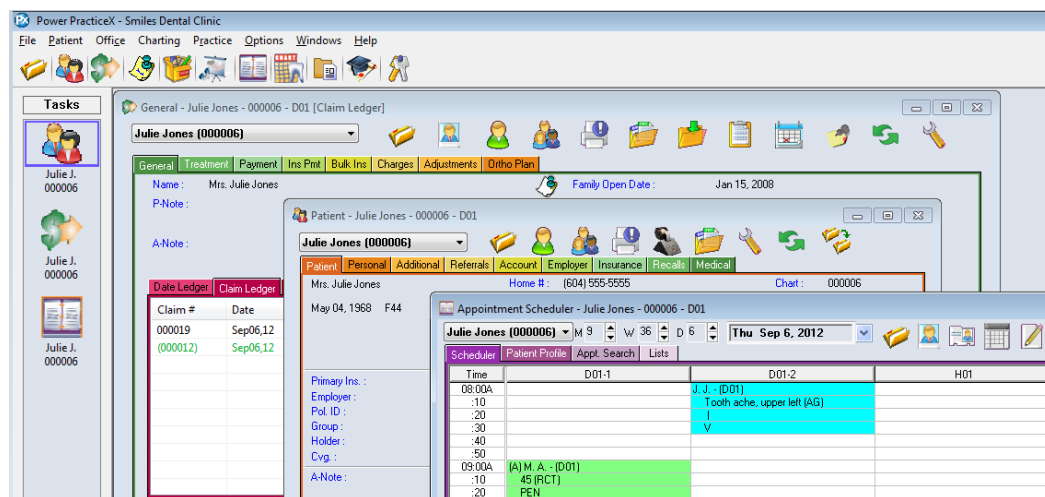
Most commonly used Icons in the Operatory:

1. Open Patient
2. Scheduler
3. Imaging
4. Optio(Patient Education)
5. Doc Manager
6. Odontogram
7. History
8. Perio Charting
9. Communicator
10. Optional: Cadi-Images

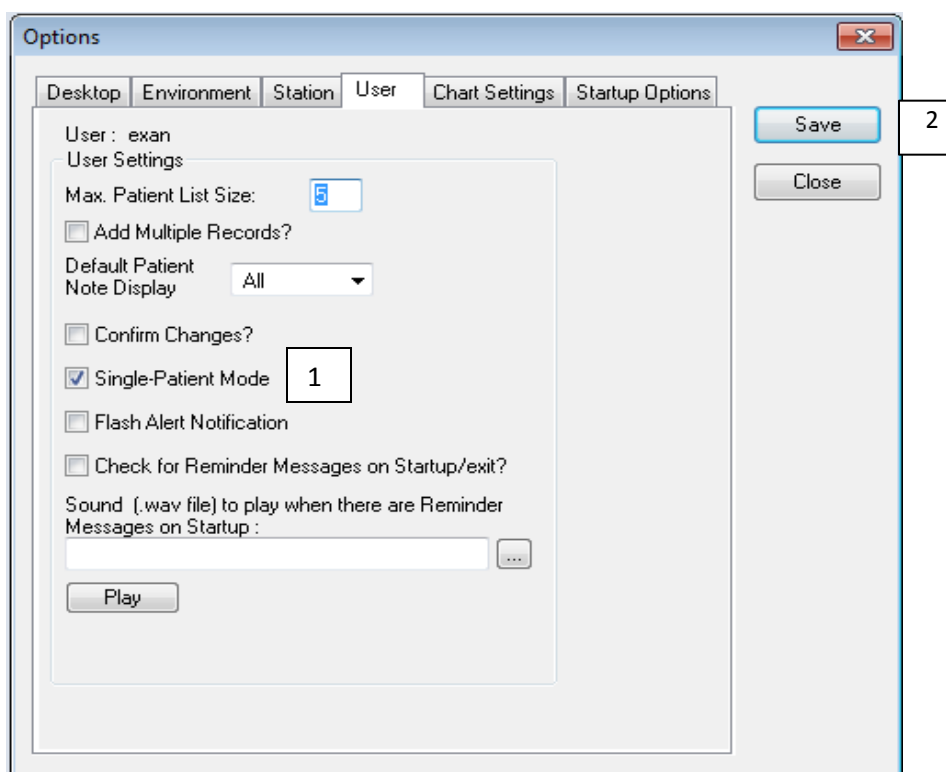
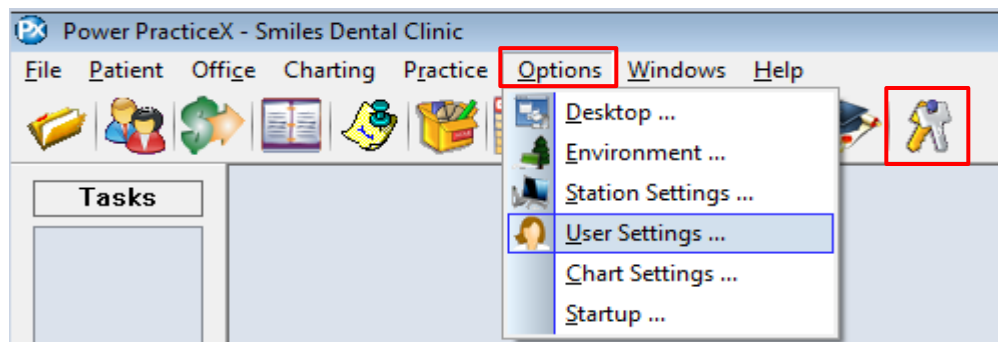


USER SETUP

Each **User** can have each module change to the current patient, called **Single Patient Mode**. For example: if you change the patient in the Scheduler, the Patient File, Transactions or other patient specific modules that are open in the Task bar, they all will automatically change to that new person as well.



This is set by clicking on **Options** (Menu or Icon) and choosing **User Settings**.

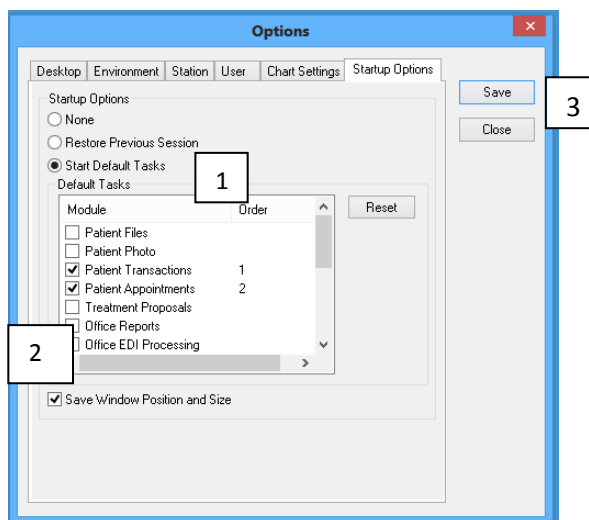
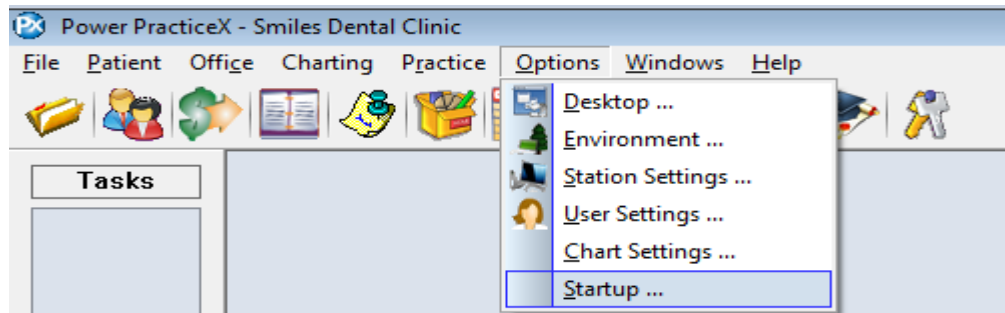


Put a tick mark in

1. **Single-Patient Mode**.
2. Click Save.

STARTUP SETUP

Based on your **User Login**, you can now have specific modules open up when you start Power Practice Px. Go to **Options** and choose **Startup...**



1. In the **Startup Options** screen, choose **Start Default Tasks**.
2. Under **Module**, choose the screens you want to open when you log into Power Practice Px.
3. Click the Save button. The last Module you choose will be the first one you see when you re-open Power Practice Px.

Other Startup Options

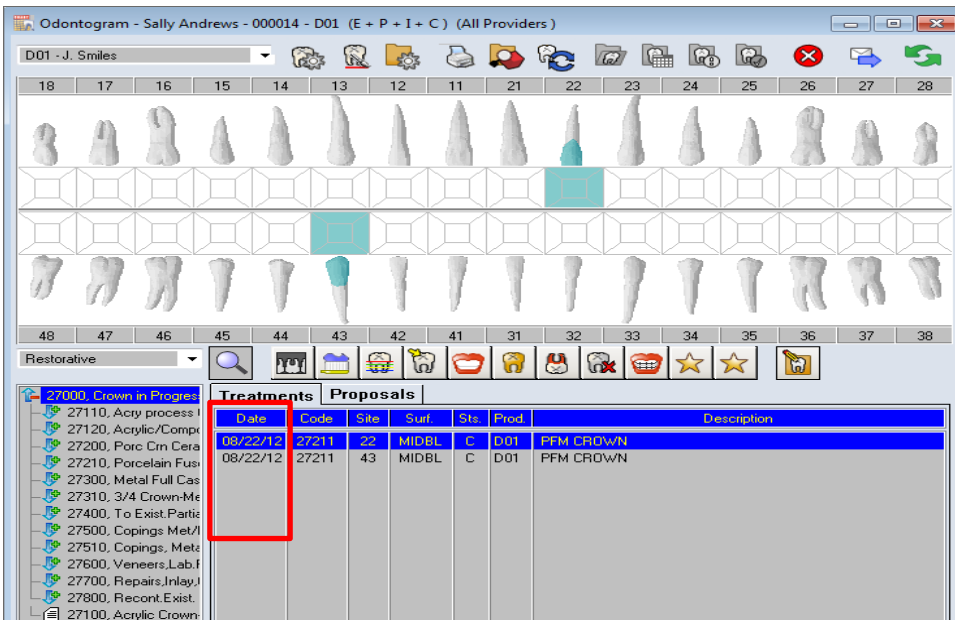
Restore Previous Session will restore the modules you had open when you last logged out of Power Practice Px.

Save Window Position and Size will reopen modules to the same size they were when you closed out.

Choosing both **Restore Previous Session** and **Save Window Position and Size** will restore your last modules in exactly the same spot and size they were when you logged out of Power Practice Px. (Note: In Windows, if one of the windows is maximized upon shut down, when the program opens all windows will open in the maximized format. Above features apply if windows chosen are specifically sized).

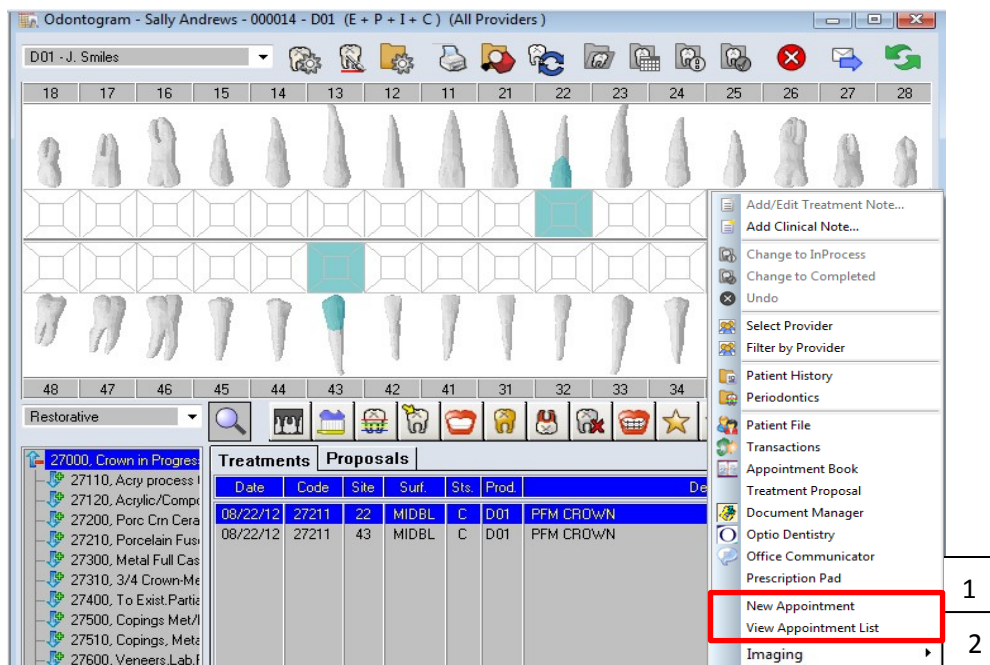
ODONTOGRAM

A **Date** column has been added to the **History Listing** in the Odontogram.



A New Right Click option enables you to

1. Add a **New Appointment**.
2. **View Appointment List**.



The Pre-existing Screen has been updated to give the user the ability to enter the following:

- 1 Multiple treatments at one time; e.g. RCT and PFM.
- 2 Additional treatments; Implant crowns, posts, and sealants.
- 3 The addition of the **All** checkbox will select all five surfaces of a restoration.

Conditions for 15

Shifted: ☐ Mesial ☐ Distal ☐ Lingual ☐ Buccal

Tipped: ☐ Mesial ☐ Distal ☐ Lingual ☐ Buccal

Rotated: ☐ Mesial ☐ Distal

Others: ☐ Extruded ☐ Diastema ☐ Missing ☐ Impacted

Partial Eruption ☐ Crowding ☐ Root Tip

Tooth Watch Surfaces: M ☐ O ☐ D ☐ B ☐ L ☐ All ☐

Pre existing Treatment:

Condition	M	O	D	B	L	All
<input type="checkbox"/> Porcelain	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Porcelain Fused ...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Stainless Steel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Root Canal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Implant Crown	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Post	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Sealant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Custom Conditions:

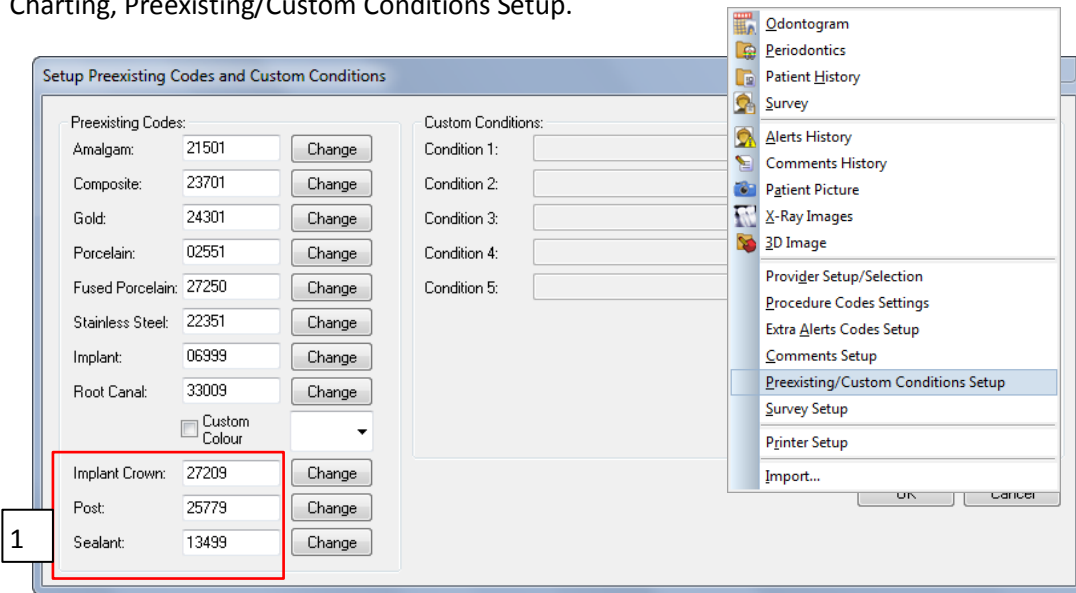
Setup

Age: ☒ Don't Change ☐ Change Selected Teeth ☐ Set All Teeth To Primary ☐ Set All Teeth To Permanent

<<< Prev Accept Cancel Next >>>

PRE-EXISTING/CUSTOM CONDITIONS SETUP

3 new pre-existing codes have been added to chart. Go to Charting, Preexisting/Custom Conditions Setup.



1. Pre-existing codes for Implant Crown, Post and Sealant are new. You will need to enter in the 3 codes shown to be able to use them.

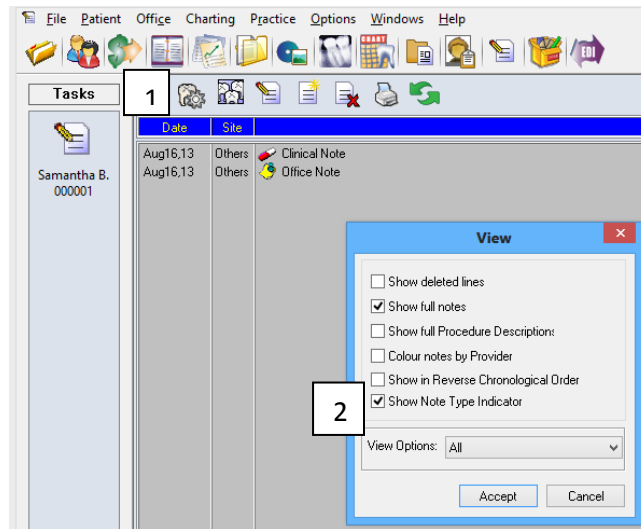
PERIODONTICS

You can now edit or add to an existing Perio Chart within the same day. If you close the Perio Chart without saving there is now a warning.

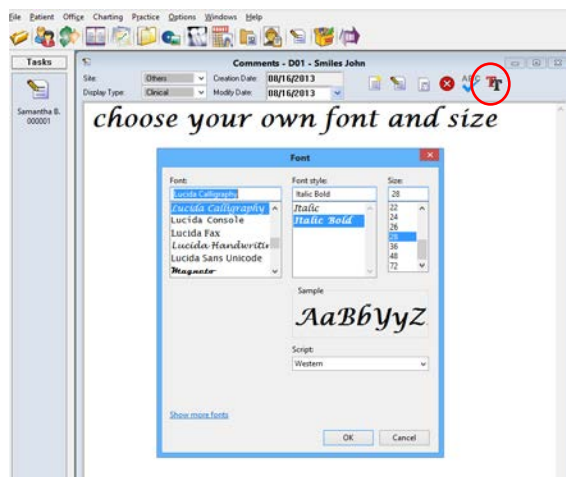
CHART NOTES AND COMMENTS

In the Comments History you can now show note types with an icon.

1. In the Chart History, click on the View Options.
2. Put a tick in Show Note Type Indicator.



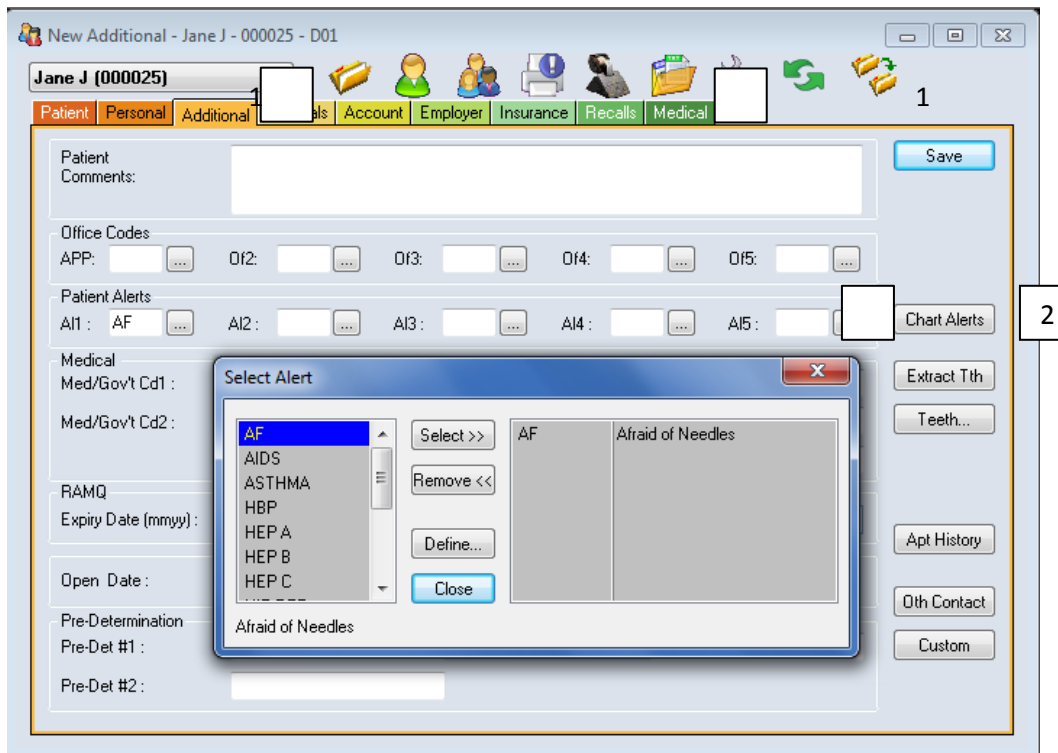
In all notes areas of Chart, you can choose how you want to view them. The font and Size are customizable to who you log into the program as.



PATIENT ALERTS FOR CHART

You can now access **Chart Alerts** from Power Practice Px.

1. Go to the **Additional** tab or **Medical** tab in the **Patient** file.
2. Click the **Chart Alerts** button.

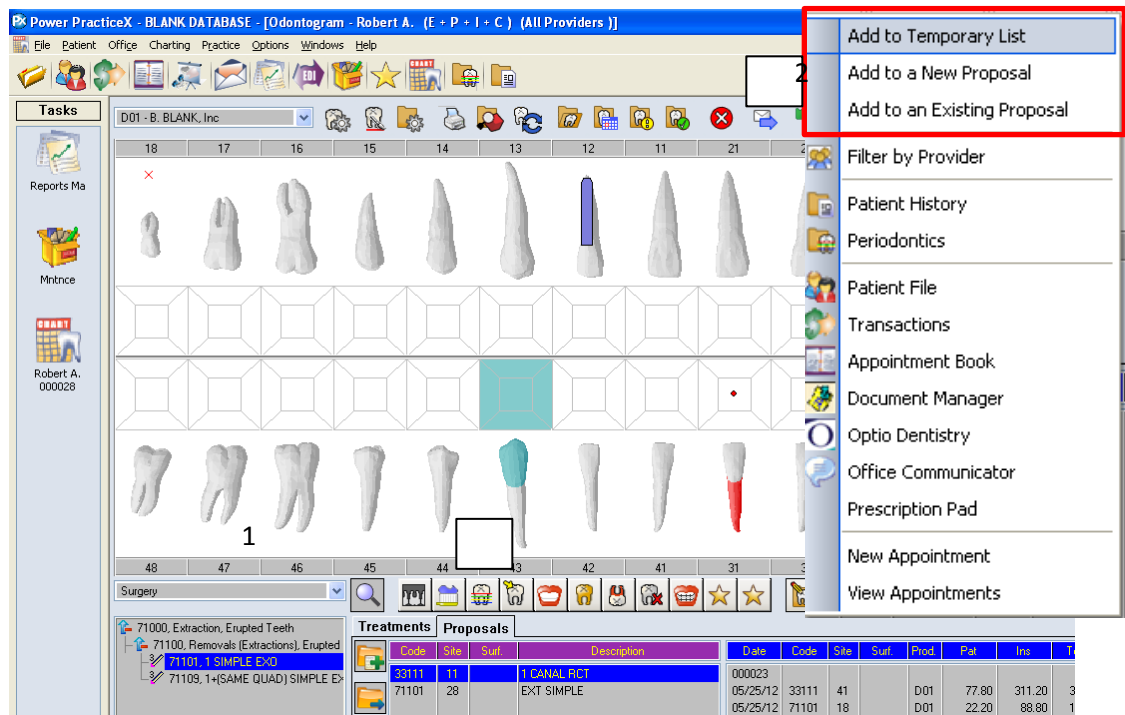


From the **Chart Alerts** you can **Define** new codes and **Remove** those that you no longer use.

TREATMENT PROPOSALS

Treatment Proposals can now be created from within the **Odontogram**.

1. To create a proposal, **click** on the **Proposals** tab. Choose the procedure you want to post from the **Quick Buttons**.
2. Right click on the **Odontogram** and choose one of the following three actions;
Add to Temporary List, Add to a New Proposal, Add to an Existing Proposal



1. Choosing **Add to a New Proposal** will add the procedure to the right hand side under the blue bar as a new proposal.
2. Choosing **Add to Existing** Proposal will add the procedure to the proposal you have highlighted on the right hand side under the blue bar.

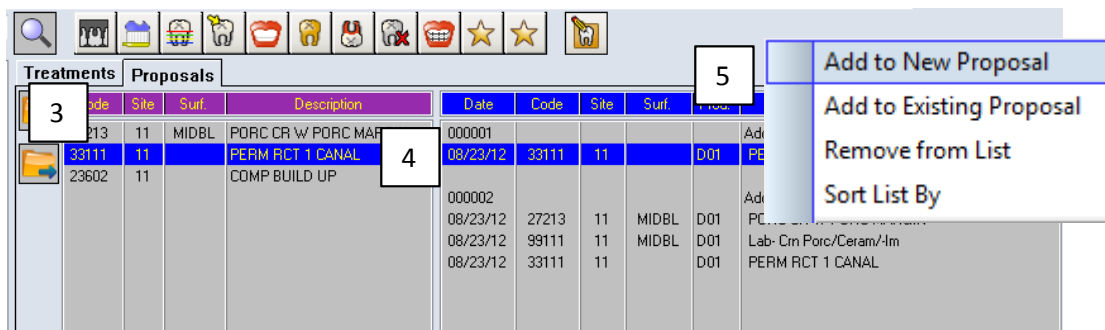
Treatments									
Proposals									
Code	Site	Surf	Description	Date	Code	Site	Surf	Prod	Description
				000001					Add to New Proposal
				08/23/12	33111	11		D01	PERM RCT 1 CANAL
				000002					Add to Existing Proposal
				08/23/12	27213	11	MIDBL	D01	PORC CR W/ PORC MARGIN
				08/23/12	99111	11	MIDBL	D01	Lab- Cmn Porc/Ceram/4mm
				08/23/12	33111	11		D01	PERM RCT 1 CANAL

3. Choosing **Add to Temporary List** will add the procedure to the left hand side under the **purple** bar to use for creating different combinations of treatment.

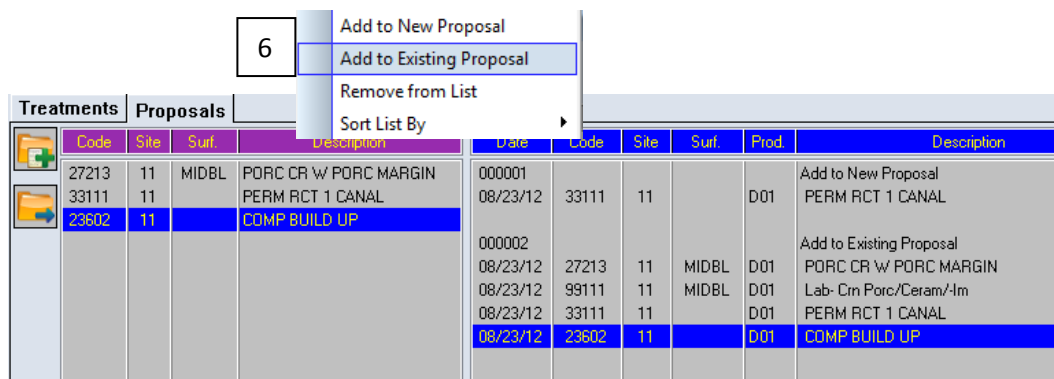
From the **Temporary list** you can create proposal options for the patient.

4. Highlight the procedure(s) you want to put into a proposal, **right click**.

5. Choose **Add to New Proposal** and a new option will be created on the right hand side under the **blue** bar.



6. Choose **Add to Existing Proposal** and the highlighted treatment on the left side will be added to the existing proposal on the right hand side under the **blue** bar.



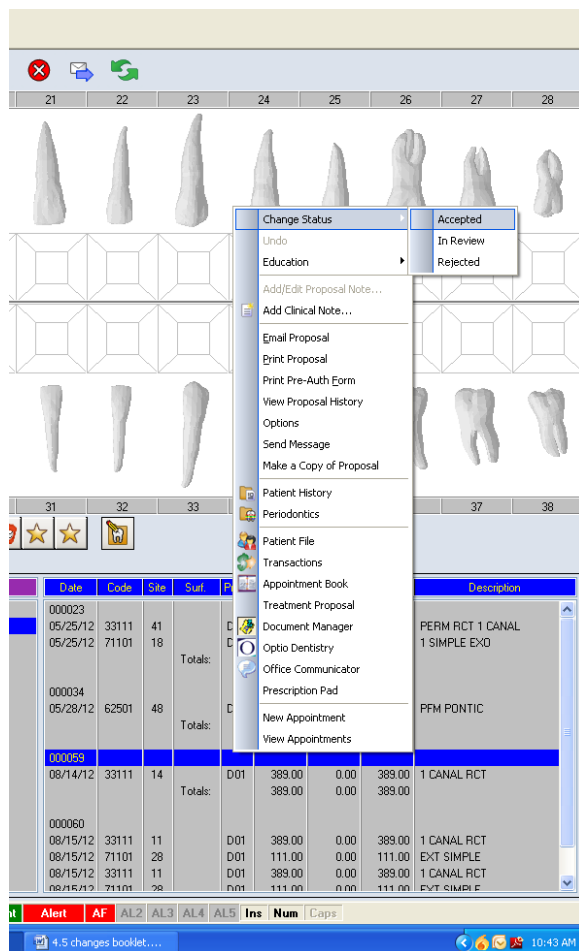
Proposal Statuses

When a proposed treatment option is either **Accepted**, **In Review**, or **Rejected**, the status can be changed by a Right Click.

If **Accepted**, the proposal will move to the treatment tab as **Planned**.

If **In Review** (presented, no decision made), the proposal will remain as is.

If **Rejected**, the proposal will be removed from the Proposals tab.



Please note: When adding a new proposal or making changes to an existing one, that information will also update in the Treatment Proposals module of Power Practice Px.

Proposal Options

1. The **Options** on the right click menu of the Proposals area will bring up the **Proposal Options**.
2. Choose which Treatment Statuses you want to view along with the Treatment Proposals.
3. You have an option for Default Billing Dr/Provider. The default is Transaction Settings.
4. You can now view Fee Columns on the Proposals Tab.

Proposal Options

Treatment Statuses to View

☐ Pre Existing ☐ In Process

☐ Treatment Plan ☐ Completed

Default Billing Dr/Provider

☒ Transaction settings

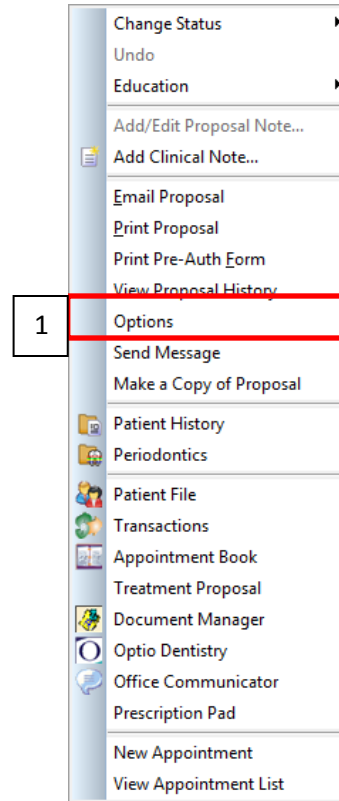
☐ Currently Selected Provider (from Dropdown)

Add Labs when Required

☒ Ask ☐ Always ☐ Never

☒ Show Fee Columns

Accept Cancel



Treatments		Proposals											
	Code	Site	Surf.	Description	Date	Code	Site	Surf.	Prod.	Pat	Ins	Total	Description
	20111	12	I	1 TTH CRIES CTRL	000001								
	27201	21	MIDBL	PORCELAIN CROWN	10/08/12	20111	12	I	D01	0.00	70.70	70.70	1 TTH CRIES (
					10/08/12	27201	21	MIDBL	D01	275.20	275.20	550.40	PORCELAIN CR
							Totals:			275.20	345.90	621.10	

Posting Multiple Restorative Procedures

You can now select multiple teeth and surfaces when posting amalgams and composites, Power Chart will pick the correct codes.

Choose your code, choose your teeth and surfaces and either Complete, Incomplete or Plan them all together. You will not need to post each tooth individually.

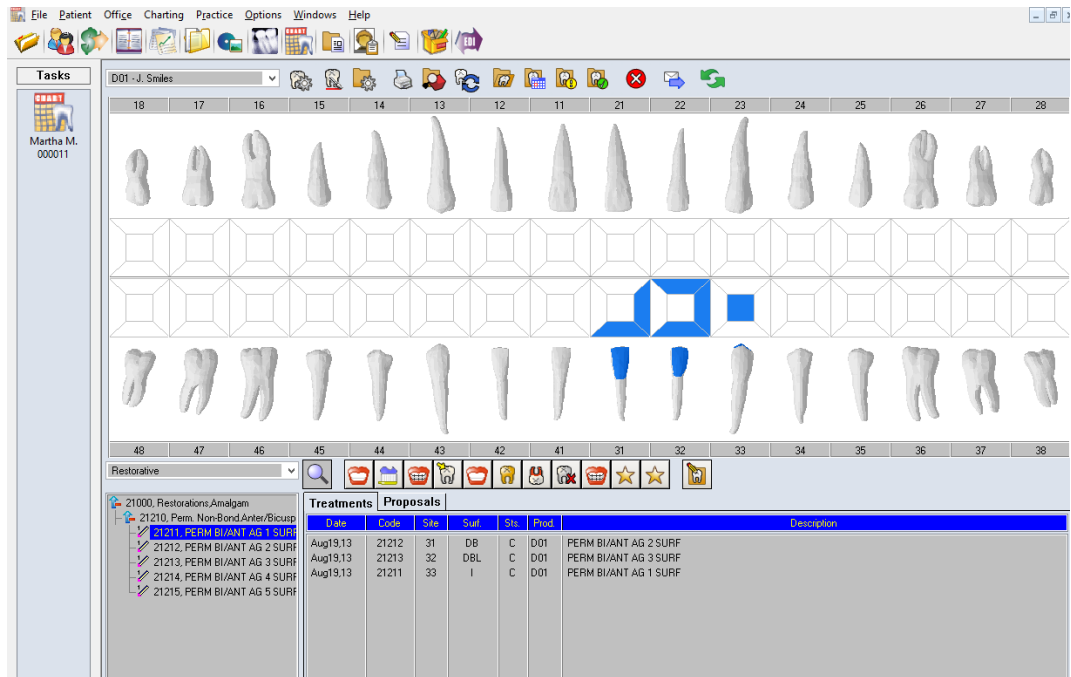
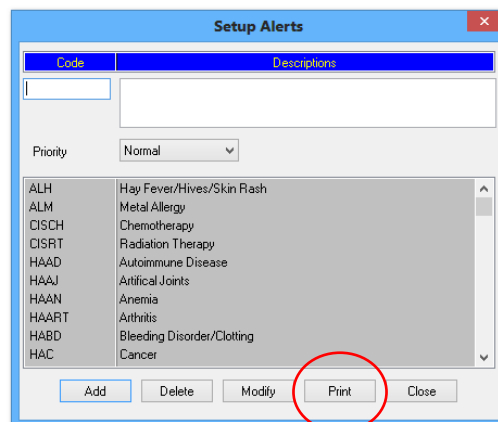


Chart Alerts

You can now print a list of your Chart Alerts.



Comments Search

You can now search on your pre-set comments in Chart. You can search by Code or Description. This is found in the **Comment Templates** button when you add a new Comment.

